



***FUTURE BUSINESS LEADERS OF AMERICA • PHI BETA LAMDA***

# ***Adviser's Handbook***

**Wisconsin Department of Public Instruction**

*Revised  
August 2003*

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# INTRODUCTION TO FBLA

**Future Business Leaders of America (FBLA)** is the national organization for all secondary school students participating in business education programs. It functions as an integral part of the instructional program of the business education curriculum in secondary schools.

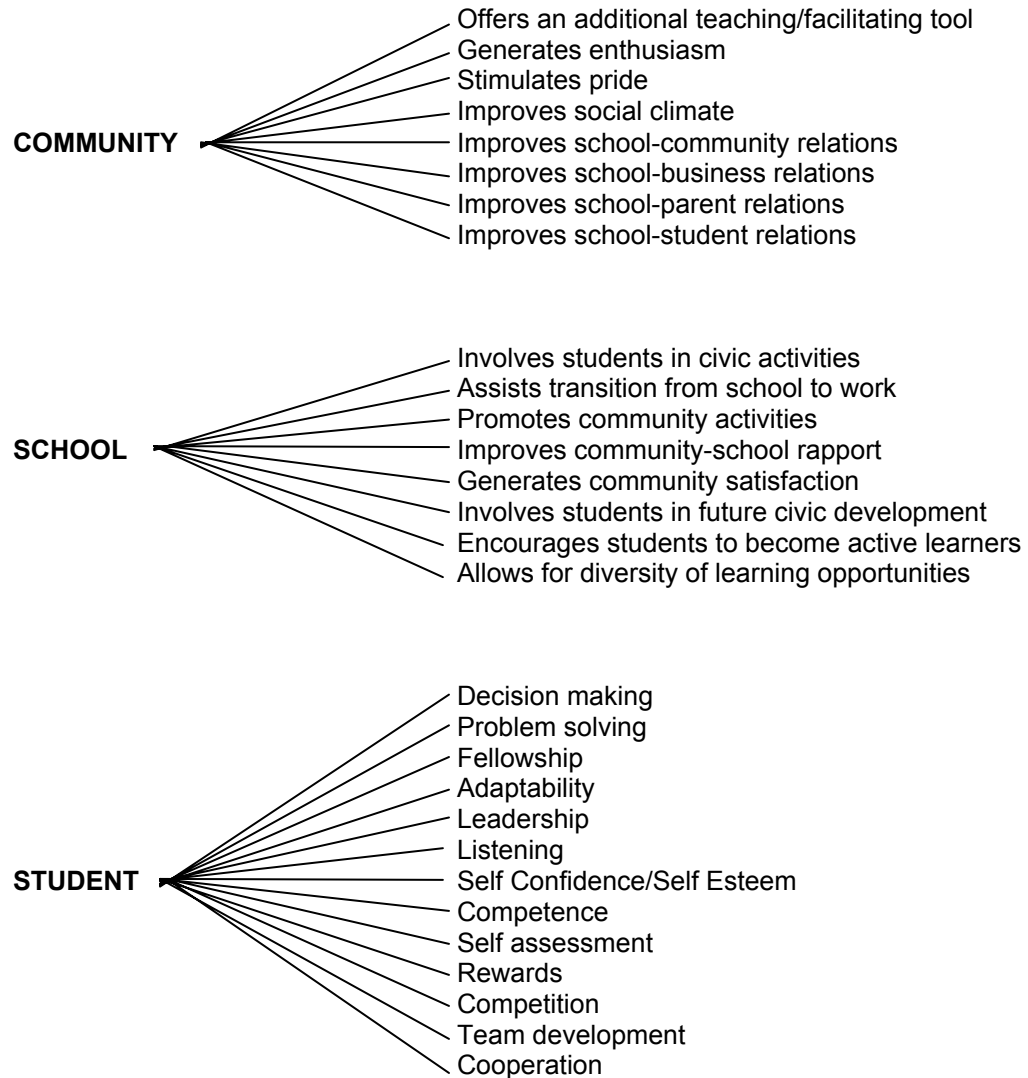
## Purpose

The purpose of FBLA is to provide, as an integral part of the instructional program, additional integrated learning opportunities for students in business and/or business-related fields to develop vocational and career supportive competencies and to promote civic and personal responsibilities.

## Goals

- **Develop** competent, aggressive business leadership.
- **Strengthen** the confidence of students in themselves and their world.
- **Create** more interest in and understanding of the American business enterprise.
- **Encourage** members in the development of individual projects that contribute to the improvement of home, business and community.
- **Develop** character, prepare for useful citizenship and foster patriotism.
- **Encourage and practice** efficient money management.
- **Encourage** scholarship and promote school loyalty.
- **Assist** students in the establishment of occupational goals.
- **Facilitate** the transition from school to work.

## FBLA Student Organization Benefits



## **FBLA Creed**

**I believe education is the right of every person.**

**I believe the future depends on mutual understanding and cooperation among business, industry, labor, religious, family and educational institutions, as well as people around the world. I agree to do my utmost to bring about understanding and cooperation among all of these groups.**

**I believe every person should prepare for a useful occupation and carry on that occupation in a manner that brings the greatest good to the greatest number.**

**I believe every person should actively work toward improving social, political, community and family life.**

**I believe every person has the right to earn a living at a useful occupation and that this right should not be denied because of race, color, creed, sex, or handicap.**

**I believe every person should take responsibility for carrying out assigned tasks in a manner that brings credit to self, associates, school, and community.**

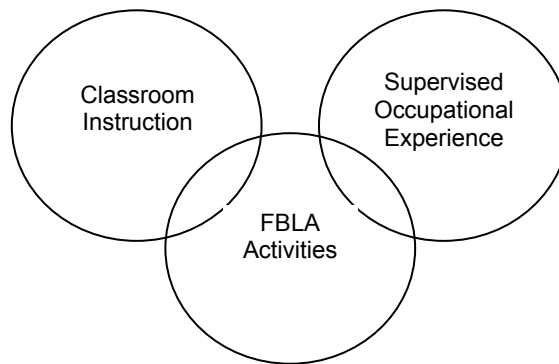
**I believe I have the responsibility to work efficiently and to think clearly. I promise to use my abilities to make the world a better place for everyone.**

**(Revised, FBLA, Inc., Board of Directors, May 9, 1984)**

## FBLA Relationship to Business Education

Career and technical student organizations (CTSO) are an integral part of vocational education. Being an integral part means CTSOs are tools of instruction which reinforce through activities what the student learns in the classroom and/or on the job. Integrated chapter activities improve the effectiveness of every educational program and help the student become more prepared to make the transition from school to work and/or postsecondary education.

CTSOs, classroom instruction, and/or supervised occupational experiences are components in the total **comprehensive and applied** vocational program and should be directly related to one another.



Classroom instruction involves the organized presentation and application of knowledge, skills, and attitudes. Supervised occupational experiences require the individual student to apply in an actual work setting the knowledge, skills, and attitudes acquired through classroom instruction. CTSO activities are part of classroom instruction and supervised occupational experiences. Integrated chapter activities improve and tie together the existing curriculum.

CTSOs make teaching more effective by providing invaluable experiences in group dynamics that enable students to accept themselves within the total group situation. Chapter activities can also provide for the development of leadership, development of a dignity for work, promotion of standards of excellence, encouragement of broader educational experiences and encouragement of cooperative efforts. In addition, student organizations provide motivation toward the development of skills through the use of techniques such as competitive events, recognition events, and awards programs.

## History

Wisconsin's first chapter was formed in 1942 at West Bend High School and was issued national chapter #39. More and more schools formed FBLA chapters as the years progressed.

Wisconsin FBLA was organized after the first ten chapters were formed. Ray Ruppel, adviser at Waukesha High School, and his wife Muriel assisted in this organization through their continuous support and enthusiasm.

The first state leadership conference was held at Waukesha High School during the 1953-54 school year. Seven chapters were represented by a total of 135 delegates.

Later in 1954 the first executive board meeting was hosted by the Beaver Dam FBLA chapter, also the site of the second annual state conference. Nine of the ten chartered chapters attended this conference.

Lorraine Missling, adviser at Nicolet High School, became the first state adviser for FBLA in 1959. Ray Ruppel continued as the state chairperson.

Attendance at Wisconsin leadership conferences continued to increase, as did the number of competitive events and other special activities. The ninth annual leadership conference was held in a larger facility at Green Lake Center, Green Lake, Wisconsin. The ninth through the twenty-fourth annual leadership conferences were held in Green Lake.

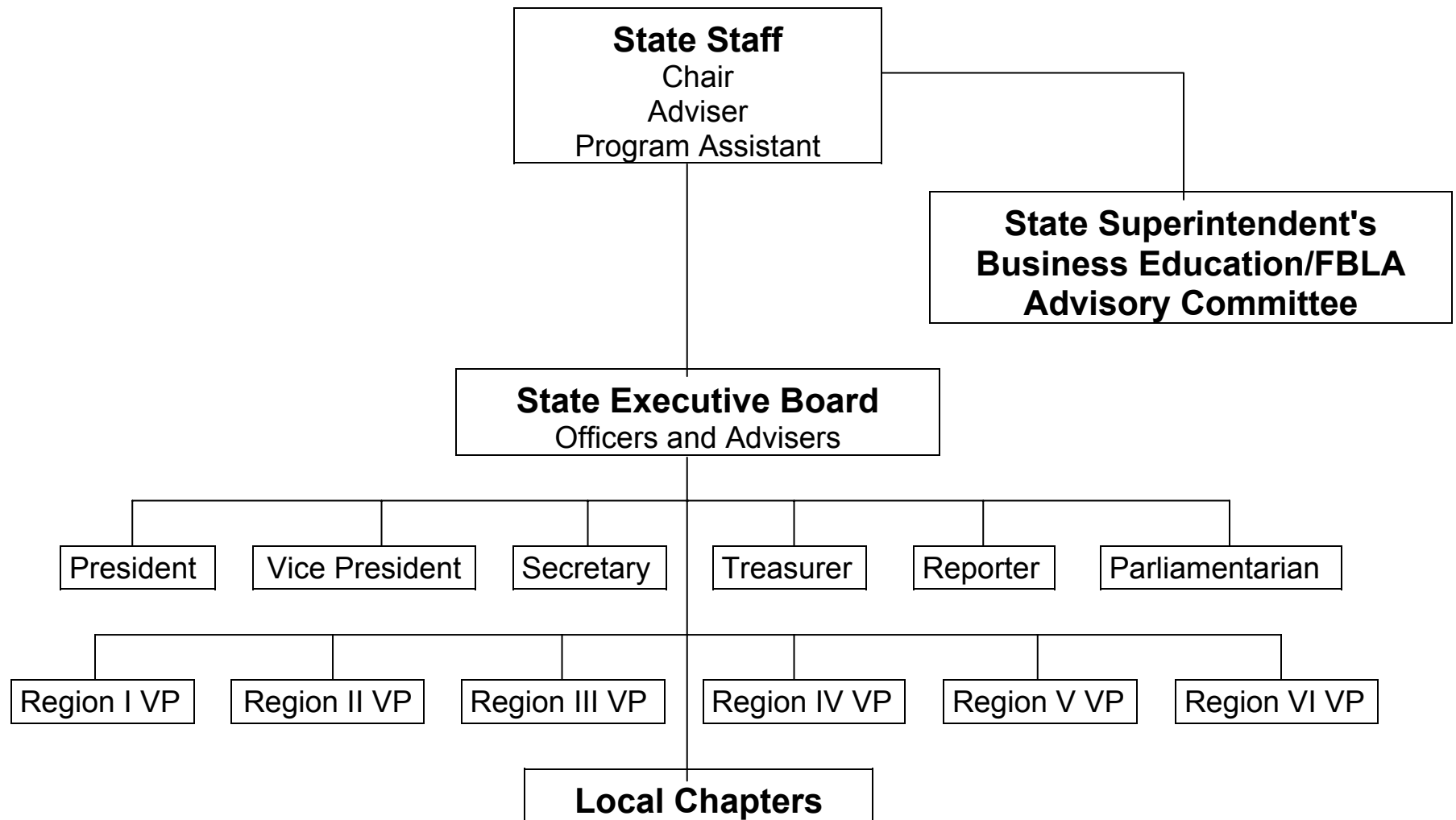
Bill Drengler from Shawano High School, state president in 1968, became Wisconsin's first national president. In 1970, Preston Smeltzer became the state adviser and Ruel Falk was appointed state chairperson. They were employed by the Wisconsin Department of Public Instruction.

In 1978, 1,200 FBLA members and advisers celebrated the 25th annual state leadership conference in Green Bay. The theme was: "Silver Standards with Golden Ideals."

The Brown County Arena was the home of the Wisconsin State Leadership Conference until 1985. Since then, the FBLA SLCs have been held at the Regency Suites Convention Center in Green Bay.

An important reason for the success we share is that we all believe in our organization and in each other. We believe in our Creed, our goals, and our personal commitments to our national student organization for business education.

## Organizational Chart





# HOW TO START A CHAPTER

The steps for starting or reactivating an FBLA chapter are basically the same. The first thing you should do is learn all you can about the organization. There are a variety of sources available. If you were previously an FBLA or Phi Beta Lambda member, your experiences will be beneficial.

## 1. Obtain Information

Contact the FBLA state office in Madison or the national office in Reston, Virginia, and indicate your desire to start a chapter. You will receive a packet containing membership information and forms required of your chapter. You can also contact a nearby local chapter adviser, who will be more than willing to help you start your chapter. The state office can supply you with a list of names of all the advisers in your local area.

## 2. Become Enthusiastic

After you have studied all available information, the next step should be very easy. Be an enthusiastic role model! When you realize how much FBLA can do for your students, your business education department, your school, your community, and yourself as adviser, you will be enthusiastic. Enthusiasm is an important part of any FBLA program—you will find that it is quite contagious. In order to have your students, administration, and fellow business education teachers become enthusiastic, you must show your enthusiasm.

## 3. Discuss FBLA with Other Business Teachers and Administration

The next step is to work with the other business teachers in your school to start a chapter. You may find that some of them will wish to serve as co-advisers or offer their services for future projects. Remind them that FBLA is an important and integral part of the total business education program and ask for their support as you approach the administration to start your chapter.

In order to have a successful FBLA program, you will need not only the permission of your administration but also their support! Before you approach them, be sure you are well organized, knowledgeable, and enthusiastic. Be sure to explain to them the added publicity and positive student response neighboring schools are receiving because of their FBLA chapters.

## 4. Inform Business Students of FBLA

Invite business students who can serve as the nucleus of your chapter. Choose students who are potential leaders. When explaining FBLA to these students, utilize all available resources. Invite FBLA members from another chapter to discuss the purposes and activities of FBLA. Generate strong interest and commitment in this nucleus, since they will be the catalyst for encouraging other students to be active members.

This nucleus, in groups of two or three, should then visit other classes. This is one time that you will need the support of the other teachers in your school. While visiting the classes, the students might distribute a student-prepared handout including the purposes, special projects, competitive events, and other activities of FBLA. The excitement from the nucleus will radiate enthusiasm to the other students. The time and place of an organizational meeting should be announced and all students should be invited.

## **5. Publicize and Plan Organizational Meeting**

Be sure that the organizational meeting is publicized well in advance. Post signs, make announcements, and encourage teachers to “talk it up” in their classes. At this meeting, you should continue to explain the FBLA program.

## **6. Conduct Organizational Meeting**

At this organizational meeting, chapter officers may be elected. Suggested officers are president, vice-president, secretary, treasurer, and reporter. The chapter may also want an historian and parliamentarian.

Your members must also decide on the dues for the year. State and national dues are listed on the current membership forms. Local dues are optional; however, you will need funds in your treasury as you begin chapter activities. Before the members leave this meeting, be sure they sign a membership list if they are interested in joining. This will give you an idea of how many students are interested. Follow-up is critical!

## **7. Work with Newly Elected Officers and Committees**

After the organizational meeting, the treasurer should start collecting dues from interested students. The treasurer may have to contact some students personally and encourage them to pay their dues by the deadline. After the dues are paid, the treasurer should prepare a membership list.

Select at least three committees: constitution, fund raising, and installation ceremony. Additional committees may be formed as needed. These committees will make the starting of an FBLA chapter much easier for the adviser. Involve members as soon as possible!

The constitution committee should write a constitution modeled on the state constitution. After the constitution is written, the entire membership will need to adopt it at a chapter meeting. The fund-raising and installation ceremony committees should also work on their plans for upcoming projects. Be sure every chapter member is functioning as an officer, committee chairperson, or an active committee member.

## **8. Submit Items to the FBLA State Chair**

As directed in the packet received from the state or national office, the following items should be sent to the FBLA State Chair:

- Application for charter (see sample on page 10).
- List of charter members.
- Copy of chapter's constitution and bylaws (see sample on pages 11 and 12).
- A check for state dues, national dues, and national charter fee. (Wisconsin is a "Non-Direct" membership state and, therefore, a payment for dues must be made to both National FBLA and Wisconsin FBLA.)

## **9. Plan and Conduct Installation Ceremony**

The installation ceremony is usually a formal, candlelight ceremony. At this time the chapter's charter is issued and your officers are installed by members of another active FBLA chapter. An outline of the ceremony is provided in the appendix of this handbook.

One of the first things you must do as you start planning your ceremony is to set a time and place. Usually a night during the week in the school auditorium or cafeteria serves the purpose. You may like to consider a business site to provide for a professional setting and to strengthen your partnerships. You should invite a guest speaker, either from FBLA or from the local community that you feel will establish the enthusiasm for a successful beginning for your chapter. Invite teachers,

LVEC, administration, school board, advisory committee, parents, and people from the media. Be sure to have the installation ceremony publicized. At the conclusion of the program, leave time for refreshments and socializing.

#### **10. Plan and Conduct Additional Activities**

Some project or activity should be started as soon as possible after the official chapter installation ceremony to avoid losing any enthusiasm. Refer to the “Chapter Activities” and “Integrating FBLA Into the Curriculum” sections of this handbook for additional activities and projects to keep students involved within the chapter. Start making plans for the regional, state, and national leadership conferences. Continue working with neighboring FBLA chapters and with your advisory committee. Keep your media people informed of all chapter activities. Keep your members busy and happy! Good Luck!

### **Important Resources**

Contact the FBLA national office (800-325-2946) for the *Chapter Management Handbook* which would be extremely beneficial in the establishment and management of your chapter.

# Sample

## NEW CHAPTER/REACTIVATION APPLICATION FUTURE BUSINESS LEADERS OF AMERICA

Complete and return this application packet to your state chairman.

- ☐ Constitution and Bylaws    ☐ State Remittance (separate check)  
☐ Listing of Members        ☐ National Remittance (separate check)

Upon receipt of this information from your state chairman, the national office will issue you a charter certificate, membership cards, and a *Chapter Management Handbook* to assist your chapter.

APPROVED:

State \_\_\_\_\_ Date \_\_\_\_\_

National \_\_\_\_\_ Date \_\_\_\_\_

Charter number \_\_\_\_\_

### I. CHAPTER INFORMATION

Complete School Name: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Adviser(s): \_\_\_\_\_

Administrative Head: \_\_\_\_\_

### II. MEMBERSHIP LIST

(If additional space is needed, list names on school letterhead, and attach to this application packet.)

- |                           |           |
|---------------------------|-----------|
| 1. (President) _____      | 16. _____ |
| 2. (Vice President) _____ | 17. _____ |
| 3. (Secretary) _____      | 18. _____ |
| 4. (Treasurer) _____      | 19. _____ |
| 5. _____                  | 20. _____ |
| 6. _____                  | 21. _____ |
| 7. _____                  | 22. _____ |
| 8. _____                  | 23. _____ |
| 9. _____                  | 24. _____ |
| 10. _____                 | 25. _____ |
| 11. _____                 | 26. _____ |
| 12. _____                 | 27. _____ |
| 13. _____                 | 28. _____ |
| 14. _____                 | 29. _____ |
| 15. _____                 | 30. _____ |

We agree to communicate with the FBLA state chairman in complying with this and other state regulations. Local, state, and national memberships are unified and not available separately.

Signed: \_\_\_\_\_ (President)      Sponsoring Chapter: \_\_\_\_\_

Approved: \_\_\_\_\_ (Adviser)      City: \_\_\_\_\_ State: \_\_\_\_\_

### III. STATE REMITTANCE

Make STATE check payable to your state chapter.

Cost per member (use this area to calculate state dues).

\_\_\_\_\_ FBLA members @ \$\_\_\_\_\_ per year = \$\_\_\_\_\_

### IV. NATIONAL REMITTANCE

Make NATIONAL check payable to FBLA.

\_\_\_\_\_ FBLA members @ \$ 6 each per year = \$\_\_\_\_\_

☐ NEW CHARTER FEE (\$20) = \$\_\_\_\_\_

or

☐ REACTIVATION FEE (\$20) = \$\_\_\_\_\_

(if applicable give original charter number) \_\_\_\_\_

TOTAL = \$\_\_\_\_\_

# Sample Bylaws

THESE suggested FBLA local chapter bylaws are intended as a guide. Local chapter bylaws must be consistent with state and national bylaws and with the FBLA-PBL, Inc. charter. Those provisions in the local chapter bylaws which derive from these higher authorities are not amendable at the local level.

## ARTICLE I. NAME

The name of this organization shall be the \_\_\_\_\_ Chapter of Future Business Leaders of America.

## ARTICLE II. PURPOSE

**Section 1.** The purpose of the FBLA chapter is to provide additional opportunities for postsecondary and college students to develop vocational competencies for business and office occupations and business teacher education. FBLA is an integral part of the instructional program and in addition promotes a sense of civic and personal responsibility.

**Section 2.** The specific goals of FBLA are to:

- Develop competent, aggressive business leadership.
- Strengthen the confidence of students in themselves and their work.
- Create more interest in and understanding of American business enterprise.
- Encourage members in the development of individual projects, which contribute to the improvement of home, business, and community.
- Develop character, prepare for useful citizenship, and foster patriotism.
- Encourage and practice efficient money management.
- Encourage scholarship and promote school loyalty.
- Assist students in the establishment of occupational goals.
- Facilitate the transition from school to work.

## ARTICLE III. MEMBERSHIP

**Section 1.** FBLA membership shall consist of members of chartered local chapters. These members shall hold membership in their state and national chapters. Individual members shall be recognized only through a state chapter of FBLA except, in the case where there is no state chapter, the member shall be recognized by the national association.

**Section 2.** National FBLA, as well as the state and local chapters, shall be open for membership to these classes of members:

*Active members* shall be secondary students who become members while enrolled in business and/or business-related fields, who accept the purpose of FBLA, subscribe to its

creed, demonstrate willingness to contribute to good school-community relations, and possess qualities for employment. Active members shall pay dues as established by FBLA and may participate in national events, in accordance with the guidelines of the National Awards Program, serve as voting delegates to the National Leadership Conference, hold national office in accordance with Article VI, and otherwise represent their state and local chapters as approved by their respective state and local advisers.

## ARTICLE IV. DUES AND FINANCE

**Section 1.** Dues. National dues shall be based on fiscal reports by the national center and on recommendations by the national executive council and the board of directors and shall be determined by a majority vote of the local voting delegates at the National Leadership Conference. National dues of members shall be forwarded directly to the FBLA national center or shall be submitted through state chapters at the discretion of the state chapter. Membership dues are unified on local, state, and national levels and are not available separately.

**Section 2.** The membership dues in Future Business Leaders of America shall be \$\_\_\_\_\_ a year, of which \$ 6.00 shall be remitted to the FBLA national center in payment of the national dues and \$\_\_\_\_\_ to the FBLA state chapter in payment of state dues.

**Section 3.** The fiscal year of the Future Business Leaders of America shall be July 1 through June 30.

**Section 4.** An audit shall be made annually by the auditing committee, which shall report at the annual meeting.

## ARTICLE V. OFFICERS AND ELECTIONS

**Section 1.** Officers of the chapter shall be: president, vice president, secretary, treasurer, reporter, historian, and parliamentarian. These officers with the adviser as *ex officio* member shall constitute the executive committee. Officers shall be elected at the annual meeting and shall hold office for a term of one year or until their successors are elected. Officers shall assume their duties at the close of the meeting at which they were elected.

**Section 2.** The chapter shall have an adviser who shall be a faculty member from the business department. This chapter may have as many special-emphasis groups under the chapter charter as it deems necessary to accommodate the interests of all students and shall assume full responsibility for coordinating the program for these interest groups.

**Section 3.** The chapter shall have an advisory council, which shall consist of educators, alumni, and other area business leaders.

## ARTICLE VI. DUTIES OF FBLA OFFICERS

**Section 1.** The president shall (a) preside over all meetings of the chapter, (b) appoint all committees and serve as an *ex officio* member of these committees, and (c) promote the growth and development of FBLA.

**Section 2.** The vice president shall (a) preside in the absence of the president, and (b) assist the president.

**Section 3.** The secretary shall (a) keep an accurate record of the chapter and executive committee meetings, and (b) submit the required reports to the state chapter and the national center.

**Section 4.** The treasurer shall (a) act as custodian of the funds of the organization, collect dues, and give financial reports, and (b) send the membership list with dues to the state and national offices.

**Section 5.** The historian shall (a) maintain records of the chapter, including an annual report of its activities, awards, and publicity.

**Section 6.** The parliamentarian shall (a) serve in any capacity as directed by the president, and (b) advise the president or presiding officer on points of parliamentary procedure.

**Section 7.** The reporter shall (a) act as public relations officer for the chapter, (b) see that news stories and photographs are delivered to the school paper, the local newspaper, the news bulletin, and the *Tomorrow's Business Leader*, and (c) cooperate with the school official concerning assembly, radio, and television programs.

**Section 8.** The officers shall serve on the executive committee, and perform such duties as directed by the president and the adviser and not inconsistent with these bylaws or other rules adopted by the chapter.

## ARTICLE VII. MEETINGS

**Section 1.** There must be at least one regular meeting a month during the school year. The regular \_\_\_\_\_ meeting shall be designated as the annual meeting for the purpose of electing officers, receiving reports of officers and committees, and for any other business which may arise. Other meetings may be held as deemed necessary by the president with the approval of the executive committee.

**Section 2.** Quorum. \_\_\_\_\_ members of the chapter shall constitute a quorum.

## ARTICLE VIII. COMMITTEES

**Section 1.** The president, on consultation with the adviser, shall appoint the following committees: (a) nominating, (b) auditing, (c) ways and means, (d) social, and (e) finance and fundraising. The president shall appoint additional committees as authorized by the executive committee. Duties of committees shall be determined by the executive committee and the adopted parliamentary authority.

**Section 2.** Local chapters may select advisory committees to assist in the growth and development of their respective chapters.

## ARTICLE IX. EMBLEMS, INSIGNIA & COLORS

**Section 1.** The chapter emblems shall be the emblems of the national organization.

**Section 2.** The official emblem and insignia items and designs are described and protected from infringement by registration in the U.S. Patent Office under the Trademark Act of 1946. The manufacture, reproduction, wearing, or display of the emblem shall be governed by the board of directors.

**Section 3.** Emblems and insignia shall be uniform in all local and state chapters and within special-emphasis groups; they shall be those of FBLA. Only members in good standing may use official emblems and insignia.

**Section 4.** The official colors of FBLA shall be blue and gold.

## ARTICLE X. PARLIAMENTARY AUTHORITY

The rules contained in *Robert's Rules of Order Newly Revised* shall govern the chapter in all cases to which they are applicable and in which they are not inconsistent with the rules of FBLA-PBL, Inc., these bylaws, or any special rules of order the chapter may adopt.

## ARTICLE XI. AMENDMENT OF THE BYLAWS

Amendments to the bylaws shall be submitted in writing at a regular meeting and shall not be voted on until the following regular meeting. A two-thirds vote of the members present shall be required for adoption.

# MANAGEMENT OF A CHAPTER

A well-managed chapter leads to student growth. Being involved as a chapter adviser requires dedication, time management skills, and being organized. The total situation must be realistically reviewed and decisions made in order to obtain maximum student educational benefits and growth!

## Chapter Meeting Time

If your chapter is unable to meet before or after school, these suggestions might be helpful.

### A. One Day Per Week Activity Period, Scattered Scheduling

For schools that provide various student organization opportunities for their students, an activity period brings benefits not only to the success of the chapters or clubs, but to the individual members. Time set aside can be used effectively when the cooperation of all instructors and personnel is prevalent.

Try this procedure:

- A1. Advisers of all chapters or clubs determine how many times their groups should meet to operate the groups effectively. Remember, determine how many GENERAL MEETINGS—at this stage, do not plan committee or officer meetings. Some meetings may be beneficial to be held off school grounds, i.e., brown bag lunch at a business site, meet in a professional setting at a corporate office or other appropriate learning environment.
- A2. Submit the meeting time requirements to a main coordinator. This coordinator will then prepare a schedule for the entire school year and/or semester.
- A3. One day per week (may vary from month to month) serves as the meeting day. From there the specific class time used is determined. For an example, Friday fourth hour is shortened 20 minutes (activity period). Another Friday second hour may be shortened 20 minutes. In this way, no class is interrupted more than once a quarter in most cases.
- A4. If students do not wish to participate in an organization meeting, the student stays in the classroom and works on homework, independent study, or special assignments.
- A5. A schedule set up at the beginning of the year is an advantage for all. Instructors know when their class will be shortened (the EXACT day, date, and time). Their curriculum plans can then reflect the adjustments without much difficulty.
- A6. The organization planning to meet should plan ahead—perhaps invite a special resource person to the meeting or plan details for a particular project.
- A7. Encourage all to attend meetings; attendance should be taken.
- A8. When the schedule is known at the beginning of the year, students and advisers can plan the entire year/semester program of work centered around those meetings.
- A9. Committee meetings can be called when the need arises. In this case, committee members can plan smaller meetings “on their own” (after school, before school, during lunch, in the evening or weekends at home or some other meeting place).
- A10. Officers can meet independently or with the adviser(s) to prepare for the general meetings. All business can be prepared for presentation during the activity period meetings.

- A11. Depending upon school policies, building principals can be of assistance when an instructor must leave his/her class to attend a meeting during the activity period. Don't just communicate to the administration—**involve them!**
- A12. If implementation is feasible, more than 20 minutes set aside for this activity period each week would prove even more beneficial.
- A13. Any one group cannot meet more than once a month. This does not include committee meetings. Proper planning will ensure proper use of this class time set aside for student activities.
- A14. Special consideration should be given in determining which meetings are scheduled opposite each other. For example, not more than four meetings at once should be a consideration. Some students will be members of more than one group. Two or more career and technical student organizations should not meet opposite each other. It may be feasible for a combination such as the following to be in operation:
- Library Club
  - Booster Club
  - One Career and Technical Student Organization
  - Letter Club
- A15. For this idea to be successful, the administration, students, and instructors must all be aware of the NEED for this important part of the school's curriculum offerings. To keep the operation moving ahead, be sure to share with all people concerned how the plan is working—or why it is not. Seek solutions and determine from any problems what the most advantageous procedures prove to be.

#### **B. Last Hour Activity Period**

Some schools have realized tremendous success with scheduling the last hour of class every day, or on a more scattered schedule, to be the time set aside for chapter or club meetings. Let us take a brief look at the advantages and disadvantages of this idea:

- B1. Members of the chapter know the exact time and date of their meetings well in advance. Plans can be made to attend and use the time slot to its full advantage.
- B2. Many, or in some cases all, students are in attendance at the school during the last hour of the school day. Attendance at the chapter meetings is thus encouraged as it conflicts with few other schedules.
- B3. It may be probable, however, that some students are permitted to leave sometime during the day for their work experiences. In that case, those students would miss the business conducted at these meetings and would experience great difficulty in retaining an active role within the chapter.
- B4. All students would not choose to be members of a particular organization. In that case, they would either have to be scheduled for study hall or lab, permitted to leave school, or some other alternative. This flexibility would cause opposition to the last hour activity period attendance as many times "finishing" the school day a little early sounds more satisfying than attending a meeting.
- B5. All groups would be meeting at the same time for some schools. Therefore, students would experience difficulties attending all meetings for any one organization if they were members of more than one.



- B6. One advantage of the last hour activity period would be that if more than the time set aside was needed, many members may find it possible to stay at the school longer. They would not be asked to report to another class at the end of the activity period.
- B7. With the cooperation of the school administration, students, and all instructors, the last hour activity period can be adjusted to accommodate the needs of most schools and their organizations.

### C. Homeroom Activity Period

The homeroom activity period has many of the same advantages and disadvantages as the last hour activity period. However, let us note its variation:

- C1. It could be assumed that more students would be at the school for homeroom than for the last period of the day. Therefore, attendance at the organization meetings should consequently be larger.
- C2. Students could be given the option of attending an organization meeting or homeroom. For the meetings to be effective, though, the school should consider an activity period of at least 20 minutes or more. For students and instructors in the “regular” homeroom, the time could be used for a variety of purposes—studying, preparing curriculum resources, etc.
- C3. If every organization turned in a list of its members in attendance to the school office following the homeroom activity period, it would be possible to still determine which students were in attendance at the start of the day. To ease the work load of the school administrative secretary, organizations should maintain an up-to-date list of members for the secretary and only turn in a report of who was NOT present, just as is done for regular classes. Most schools could identify the quickest and most accurate procedure for all concerned.
- C4. An important point for the homeroom activity period concept: Difficulty is again experienced in selecting which meeting to attend. All organizations would again be meeting simultaneously.
- C5. Variations of the homeroom activity period concept are feasible. Spend time analyzing the idea to adapt it to your school’s needs.

### D. Midday Activity Period

Once again, the mid-day activity period faces many of the same good and bad points as do the last hour and homeroom periods. A few more advantages:

- D1. With even more students still at the school during midday, more students would be available for organizational meetings.
- D2. Resource persons, speakers, and guests may find it more convenient to come to the school at this time of day rather than early morning or late afternoon
- D3. The midday activity period could be planned either before or after the lunch period; thus, encouraging students to conduct pre-meeting or post-meeting discussions related to activities or projects of their organization.

### E. Committee Concept

Let us presuppose that an activity period cannot be implemented into your school day. Let’s further assume that it is extremely difficult for the chapter to meet as a full group before school, after school, in the evening, or on weekends. One point is still prevalent: **The students deserve the opportunities available through membership in the organization!** We, therefore, must plan a chapter structure based on the “committee concept.”

- E1. Develop a program of work at the beginning of the year. Base its format on committee responsibilities, however large or small any one committee may need to be.
- E2. Involve **all** members in a minimum of one committee.
- E3. Provide the leadership and communication process necessary to explain, in detail, exactly what each and every member is expected to do as integral segments of any one committee.
- E4. Provide encouragement and guidance to assist the committee chairperson in accomplishing the task he/she is expected to do.
- E5. Identify **IN DETAIL** the duties and responsibilities of the officers.
- E6. Encourage committees to meet independently at times that meet the schedules of those particular members.
- E7. Encourage chapter officers to do the same.
- E8. The adviser should receive written (or verbal) reports from each working group on the progress of committee work. Assistance should be given if it is needed. The adviser should be prepared to offer suggestions on other individuals who could provide further direction if this applies to the situation. One example would be a committee working on a March of Dimes walk-a-thon—refer the committee to a particular individual who is employed by MOD to assist our FBLA members with their project(s).
- E9. The members should also receive up-to-date progress reports. These reports can be disseminated via homeroom, student mailboxes, one central location (FBLA desk in business education room), on or near the FBLA bulletin board, or through a computer network system.
- E10. Most projects (such as the walk-a-thon) require the cooperation of the entire membership. With committee leadership conducted effectively, the end product is the day of the walk-a-thon—everyone prepared and ready to walk. This brings the entire membership together, although the planning was a product of committee work.
- E11. When a committee plans a field trip, special evening meeting with a speaker, video, or demonstration, the entire membership should be informed and asked to attend. These could include a “cooperative meeting” with another organization such as a civic group. They then serve as the chapter’s full-group meeting.

## Local Officers' Responsibilities

### President

- Presides over and conducts meetings according to accepted parliamentary procedure.
- Keeps members and discussion on track.
- Appoints committees and serves as an *ex-officio* member to each.
- Coordinates charter activities by keeping in close touch with the other officers, the membership, and the adviser.
- Calls special meetings as needed.

### Vice President

- Assists the president in the discharge of duties.
- Presides at meetings in the absence of the president.
- Prepared to assume the duties and responsibilities of the president should the need arise.
- Oversees all committee work and management of assignments.
- Serves as an *ex-officio* member of chapter committees.

### Secretary

- Prepares and reads the minutes of meetings.
- Provides the president with an agenda for each meeting.
- Attends to official correspondence and distributes meeting notices.
- Counts and records votes when taken.
- Prepares chapter reports.
- Works with the treasurer in keeping an accurate membership roll.
- Reads communications at meetings.

### Treasurer

- Receives and acts as custodian of chapter funds.
- Collects all state and national dues and is responsible for their disbursement by the appropriate deadlines.
- Keeps financial records neat and current.
- Plans, with the assistance of the chapter and adviser, appropriate fundraising activities.
- Handles the chapter's receipts and expenditures.
- Encourages efficient money management.
- Assist as in the preparation of annual statement of receipts and expenditures.

### Reporter and/or Public Relations Officer

- Develops media lists for chapter mailings.
- Gathers, classifies, and stores chapter news.
- Prepares news releases and articles for publication in school and local newspapers.
- Assists with planning and arranging chapter exhibits.
- Prepares news and feature stories of the chapter's activities for the state newsletter, the *Badger Business e-Bulletin*, and for the national publication, *Tomorrow's Business Leader*.

### Historian

- Maintains a history of the chapter, including an annual report of chapter activities, awards, and publicity.
- Files clippings and pictures of the chapter's activities.
- Keeps a chapter publicity and activity scrapbook.

### Parliamentarian

- Assists chapter members in understanding the basic purpose of parliamentary procedure.
- Is prepared to advise the presiding officer and other chapter members on parliamentary procedure.
- Has reference materials pertaining to parliamentary procedure available for each meeting.

## **Local Chapter Advisers' Responsibilities**

1. Advise and guide—do not dictate.
2. Positively assume that chapter activities will be successful. Know that chapter activities are strong teaching/learning tools. Show enthusiasm!
3. Establish basic ground rules and high expectations that help students lead themselves.
4. Be knowledgeable about FBLA—goals, purpose, structure, constitution and bylaws.
5. Provide leadership development experiences for all members.
6. Assist students in developing a meaningful program of work and a calendar of events.
7. Remember that chapter activities are student centered activities and not teacher centered.
8. Submit membership dues promptly at the beginning of the year to assure full service for members.
9. Provide training for chapter officers and committee chairpersons.
10. Oversee the keeping of records and financing of activities.
11. Assist in setting up chapter files and a library of chapter materials.
12. Keep school administration, local businesses, community, parents, teachers, school staff, and media people informed of chapter activities.
13. Establish a link between the school program and business community.
14. Encourage members to participate in all levels of FBLA.
15. Recognize outstanding members.
16. Keep chapter members informed of FBLA activities at the regional, state, and national levels.
17. Be committed to each student, welcome the diversity, and be a positive role model in actions and deeds.
18. Be knowledgeable of educational initiatives and how FBLA “fits” the needs and opportunities provided by those initiatives. Communicate this information to appropriate individuals and groups.
19. Enjoy your role of mentor. You are providing opportunities for students to develop strong self images in becoming active, positive citizens.
20. Congratulate Yourself!

## **Responsibilities of Wisconsin FBLA State Officers and Their Advisers**

**(from: Wisconsin's Competitive Event Guidelines)**

FBLA state officers have specific expectations and responsibilities while they are in office. Financial reimbursement accompanies the responsibilities except where otherwise indicated

### **RESPONSIBILITIES**

1. Attend the state officer training workshops in June in Madison, Wisconsin. Reimbursement will be provided for each state officer and one adviser. Round-trip mileage, selected overnight accommodations and any meals scheduled as part of the training session are reimbursed. Typically, accommodations are in dorms and meals are provided in residence halls--the state usually funds these projects and pays expenses.
2. Attend all executive board meetings. Officers will be reimbursed only for round-trip mileage and must be accompanied by their advisers to receive reimbursement. The officer and adviser must travel together to the meeting to be eligible for reimbursement.
3. Provide leadership in arranging, attending, and conducting two Fall Leadership Labs for local officers and members in the state. Round-trip mileage and overnight accommodations are reimbursed for the Leadership Lab outside the officer's region. The state officer and their adviser are exempted from paying a registration fee for the Leadership Lab outside their region.
4. Attend the National Fall Leadership Conference held annually. Chapters will be reimbursed \$100 for the state officer attending.
5. Attend and/or organize RLCs. If an officer attends and helps at a RLC other than his/her own, any expenses may be reimbursed by the host region.
6. Assist with the SLC. This responsibility includes volunteering for and carrying out one of the following conference needs.

Thursday Registration  
Monopoly Tournament  
Publicity

Friday Night Activities  
Friday Assembly Seating Assignments

Flowers & Banner Placement  
Exhibits  
Friday Awards Program Seating  
Others (As Needed)

No financial reimbursement is made for state officers to attend the SLC. However, the registration fee for the officer and his/her adviser will be waived. (Only one adviser per officer is waived.)

7. Attend and participate fully at the annual NLC held in the summer at the beginning of the term. Officers shall receive a stipend of \$150.
8. Speak at and/or attend various conferences and meetings on behalf of the Wisconsin FBLA Chapter. Reimbursement is provided when the state office requests an officer's presence and/or participation or when a local school or chapter requests the officer to serve on the program and represent the state chapter.
9. State officers should wear an official FBLA blazer at all functions when representing FBLA. Cost of purchase is not reimbursable.

## **AUTHORIZED EXPENSES**

1. **Mileage** to and from meetings from which an officer is invited to attend and is part of the program—to receive reimbursement, written evidence of having been a part of the program must be submitted (letter of invitation, copy of program). When the officer's chapter serves as the installing chapter for a new or reactivating chapter, no reimbursement is provided for the officer. Rate of reimbursement for mileage is 32.5 cents per mile. Officers must travel with an adviser to receive reimbursement.
2. **Hotel Expenses**--Prior approval must be received before submitting hotel bills. State single rate of \$62 (including tax) cannot be exceeded. It is expected that rooms will be shared whenever possible.
3. **Meal Expenses**--As of September 15, 1979, executive board members voted to relinquish in-state meal expenses except when an overnight stay is required, in which case the per day expense of \$8.00 shall be reimbursed. Receipts are required.
4. **Telephone calls** are not considered reimbursable unless special permission has been received in advance of placing the calls. Conference calls can be arranged by the state office.
5. It is **required** that officers will attend the National Fall Leadership Conference held annually. Chapters will be reimbursed \$75 for state officers attending—no other expenses are reimbursed.
6. It is **required** that officers will attend the FBLA National Leadership Conference at the beginning of their term. Officers will receive \$150 from the state treasury if they attend at that time--no other expenses are reimbursed.
7. It is **required** that officers will attend state officer training workshops. Reimbursement will be provided for each state officer and one adviser. Round-trip mileage, selected overnight accommodations and any meals scheduled as part of the training session are reimbursed. Typically, accommodations are in dorms and meals are provided in residence halls--the state usually funds these projects and pays expenses.
8. It is **required** that officers will provide leadership in arranging, attending, and conducting **two** Fall Leadership Labs for local officers and members in the state. Round-trip mileage and overnight accommodations are reimbursed for one Leadership Lab outside the officer's region. In-state meal expenses of \$8.00 per day will be reimbursed with the overnight stay. The state officer and their adviser are exempted from paying a registration fee for the Leadership Lab outside their region. Officers and advisers are responsible for all expenses incurred at the Leadership Lab held in their own region--including registration fees.
9. It is **required** that officers will attend all executive board meetings. Officers and one adviser will be reimbursed for the round-trip mileage. Officers must travel with an adviser to receive reimbursement.
10. No financial reimbursement is made for attendance at state or regional conferences, although the registration fee is waived for each state officer and one adviser at the State Leadership Conference. If an officer attends and helps at a regional conference other than his/her own, any expenses **may** be reimbursed by the host region.

## CHAPERONING

If the officer's adviser is unable to accompany the officer on a trip, adequate chaperoning arrangements must be made. It is requested that a mature adult accept this responsibility. School regulations regarding this issue must not be violated.

## SPECIFIC RESPONSIBILITIES

**President:** It shall be the duty of the president to preside over all executive board meetings and the annual SLC. The president shall appoint all necessary committees and shall serve as chairperson of the SLC program committee. As part of this responsibility, the president shall initiate correspondence on behalf of the planning for the conference with the assistance of the state office. The president shall correspond with prospective and new chapters in the state offering encouragement and assistance where appropriate. It is the responsibility of the state president to submit a short monthly report on Wisconsin FBLA activities to the editor of the national publication, *Tomorrow's Business Leader*, or within whatever time frame is established by the national staff or officers. The president will serve as a voting delegate at the NLC. The president is expected to accept as many of the speaking invitations he/she receives as possible.

**Vice President (General):** In the event that the office of the president becomes vacant, the general vice president shall assume all duties of the presidency. The general vice president shall also have primary responsibility for preparing the Wisconsin Annual Report with the assistance of the state president and the state office. The general vice president shall be responsible for coordinating the state service projects (such as March of Dimes, Children's Hospital, etc.). This includes conducting research to present to the executive board on potential projects for the year. This officer will also solicit proposals for recipients of the service project proceeds. The general vice president will serve as a voting delegate at the NLC. The general vice president is expected to accept as many of the speaking invitations he/she receives as possible.

**Vice President (Regional):** The six (6) regional vice presidents will have the major responsibility of planning and hosting their respective RLCs. They will also serve as liaisons between the executive board, the state office, and all FBLA members in their respective regions. The regional vice presidents shall initiate communications and follow-up with prospective and new chapters and encourage reactivation of inactive chapters. The regional vice presidents will appoint a secretary to record the minutes for regional meetings. The regional vice presidents shall accept as many of the speaking invitations they receive as possible.

**Secretary:** The secretary shall perform the duties common to this office, keeping an accurate record of SLC and executive board meetings. One (1) photo-ready copy of the minutes of these meetings must reach the state office within ten (10) days following the meeting. Duplication and distribution will be handled by the state office. The secretary shall initiate correspondence associated with this office, with assistance by the state office. The secretary shall accept as many of the speaking invitations he/she receives as possible.

**Treasurer:** The treasurer shall present the financial report of the Wisconsin FBLA Chapter at the SLC and executive board meetings. All budgeting and monetary responsibility is maintained at the state office; however, the treasurer will receive information as to the accounting system and method of operation. The treasurer shall initiate memorandums and secure information relative to the use of the state approved fund raisers and shall promote the use of such fund raising projects by local chapters. The treasurer will be responsible for obtaining and distributing the medals and plaques for the six (6) regional leadership conferences held in February. The treasurer will be responsible for obtaining and/or maintaining and distributing promotional items, such as road signs, trading pins, etc. The treasurer shall accept as many of the speaking invitations he/she receives as possible.

**Reporter:** The reporter is responsible for publishing monthly issues during the FBLA year of the *Badger Business e-Bulletin*, the official state publication of Wisconsin FBLA. The bulletin is intended to include reports of local chapter activities which are of interest to other chapters, suggestions for activities which

are educational in nature, ideas for classroom activities with relationship to our organization, state officer reports, highlights of past workshops, meetings or conferences, and reminders of upcoming events. Format and dissemination plans are to be discussed with the state office prior to the first issue's production. The reporter will be responsible for helping to maintain the FBLA state slide presentation, as well as, assist the state president in submitting appropriate items to the editor of the national publication, *Tomorrow's Business Leader*. The reporter shall accept as many of the speaking invitations he/she receives as possible.

**Parliamentarian:** The state parliamentarian will be the individual who has one or more years remaining in FBLA, scores highest on the parliamentary procedure written test, and has indicated a willingness to serve on the event entry form. The individual shall serve as the official parliamentarian at all business sessions of the Wisconsin FBLA Chapter. The parliamentarian shall accept as many of the speaking invitations he/she receives as possible.

#### **RESPONSIBILITIES OF ADVISERS OF OFFICERS**

Selection of a state officer candidate is a major responsibility of the local chapter adviser. He/she will serve as that potential officer's adviser during his/her term in office. The adviser should carefully consider whether the student possesses the leadership qualities and skills necessary for serving the organization as an officer.

A thorough understanding of the organization's purposes, goals, and program of learning enables the student to bring valuable insight to the office. Although not a strict prerequisite, it is helpful for the state officer candidate to have served in the office he/she is campaigning for at the local level. The officer candidate should have been involved in many aspects of the local chapter's activities. The adviser should discuss with the student the responsibilities which are part of serving as a state officer (refer to Competitive Event Guidelines) and the commitments that must be made to ensure a successful venture.

The adviser must be prepared to accept the added responsibilities and obligations associated with having a state officer. The adviser is expected to accompany the officer to training, meetings, leadership labs, and conferences which require the officer's attendance and/or participation. The adviser serves as a member of the state executive board and **MUST BE PRESENT** for all executive board meetings. Often the adviser's assistance is solicited for special committee responsibilities and projects to strengthen the FBLA program of work. The adviser must be prepared to accept more responsibilities for carrying out the program of work for the state chapter than is normally expected of other local advisers.

The officer candidate must receive the support of his/her entire local chapter membership. Occasionally tasks and committee assignments accepted by the officer will require assistance from members of the local chapter. These responsibilities will provide valuable educational experiences and recognition for the officer and fellow chapter members. An FBLA state officer must have the support and encouragement of his/her adviser, local chapter, parents, and school officials to provide the reinforcement necessary for the officer to achieve success during his/her term in office.

**Time should be set aside for the adviser, officer candidate, parents, and school administration to discuss the responsibilities and obligations of serving as an FBLA state officer. The purposes, goals, program of learning, and how FBLA fits into the instructional program should be discussed. Activities of the local, state, and national levels should be explained. Everyone should be made aware of the amount of time that will be devoted during the term in office. The parents, advisers, officer candidate, and school officials should be familiar with the expenses that will be reimbursed from the state treasury and those that would require financial assistance from other sources.**



## **State Office Staff**

Following is a list of suggestions outlining some of the ways the state office staff can serve the adviser and FBLA chapter:

1. Coordinate mailing services.
2. Coordinate activities at the regional, state, and national conferences.
3. Conduct state officer-training sessions.
4. Articulate with other career and technical student organizations.
5. Represent Wisconsin FBLA at state and national business education conferences.
6. Provide resources on parliamentary procedure.
7. Represent FBLA at Department of Public Instruction conferences.
8. Provide resources on leadership development.
9. Manage financial operation of Wisconsin FBLA and The Wisconsin FBLA-PBL Foundation, Inc.
10. Serve in advisory capacity to state executive board.
11. Provide state slide/video presentations for local use.
12. Assist in the integration of FBLA and other educational initiatives.
13. Provide historical information for chapters, administration, and others.
14. Assist with communications between regions and other chapters.
15. Continued commitment to FBLA students and advisers in order to provide for positive growth as individuals and members of "teams," thereby assisting in the life-long learning needs and goals of all students.

# **Chapter Committees**

## **WHO NEEDS THEM?**

Every chapter which hopes to carry out a successful program of work needs active committees that involve as many members as possible. It is easy for a small group of members within a chapter to do all of the work...but it is not good for the chapter as a whole or for the members individually. Almost every chapter project needs the guidance of an active committee.

Big events, such as major fund-raising activities, money-management projects, or community-service tasks, are usually directed by a general chairperson, who appoints the necessary subcommittees. It is the duty of the general committee chairperson to outline for the subcommittees their specific duties and responsibilities and to maintain a close liaison to assure that assigned tasks are accomplished.

## **WHO APPOINTS THEM?**

The president of the chapter usually appoints committee chairpersons. The president and the vice-president (who is in charge of committee work in general) are ex-officio members of all committees. Committee members or subcommittees are usually appointed by the general committee chairperson.

In selecting committee chairpersons, the president should seek volunteers who have the qualities of organizational ability, perseverance in completing tasks, and interest in the specific project.

## **ROLE OF THE COMMITTEE CHAIRPERSON**

The effectiveness of a committee will depend on how well the committee chairperson performs his/her role as a leader. The committee chairperson's role includes definite responsibilities of appropriate delegation and the ability to:

1. Appoint subcommittee chairpersons and bring them together for a general committee meeting. He/she chairs the meeting and assumes responsibility for introducing all committee members.
2. Appoint a secretary of the general committee to take minutes of the meeting. It should not be the responsibility of the committee chairperson.
3. Explain to the committee the task or problem to which it has been assigned.
4. Discuss the desired goals of the committee's work and methods of attaining them.
5. Ask for suggestions from all committee members and be receptive to these suggestions.
6. Summarize and discuss all suggestions for accomplishing the tasks.
7. Provide for group discussion.
8. Summarize to be sure the group understands what has been decided. This is important to the future operation of the committee.
9. Thank members of the committee for their assistance.
10. Review minutes of the committee meeting with the appointed secretary.
11. Prepare committee reports and distribute to chapter officers and members as directed.
12. Give an oral report at a general chapter meeting as directed.

## Program of Work

A program of work should be **prepared and implemented annually** by each local chapter. The purpose of the program of work is to help all active and prospective FBLA chapters systematically plan the year's activities. It is intended to help chapters meet the objectives and purposes of FBLA as stated in the national, state, and local chapter constitutions. It should include specific goals and means of reaching those goals. Adequate provision for evaluating accomplishments at the end of the year should also be included. A sample program of work is included on the next pages.

There is a definite sequence your chapter members should consider as they prepare the program of work. It should represent the combined thinking of the total local membership.

1. Review, **as a total chapter**, the FBLA goals.
2. Review, as a total chapter, the purposes and major outcomes of career and technical student organizations. This information is included in Appendix B.
3. Review copies of programs of work from past years (or from other chapters).
4. Select activities that will definitely be included.
5. Appoint a program of work committee with subcommittees for each section of the program. This committee should survey further possibilities, check needs, study recommendations already given, and set up a tentative program of work-including local goals, activities, and objectives. Depending on your chapter's constitution and bylaws, this may become a standing committee in your chapter.
6. Report to the total membership and write the finalized program of work.
7. Check program of work with school authorities and others concerned.
8. Approve program of work at chapter meetings and appoint permanent committees responsible for each major division.
9. Submit completed program of work to the FBLA state office by December 1. Be sure your LVEC receives a copy.
10. Revise program of work during the year as necessary to include additional activities.



# Future Business Leaders of America PROGRAM OF WORK

(▼ Rev. 8/03)

**INSTRUCTIONS:** Return the original and one copy by **DECEMBER 1** to:

**WISCONSIN FBLA STATE OFFICE**  
**ATTN: ERIK SITTS**  
**125 SOUTH WEBSTER STREET**  
**P.O. BOX 7841**  
**MADISON, WI 53707-7841**

## GENERAL INFORMATION

School/Chapter Name	Region	For School Year
---------------------	--------	-----------------

School Address <i>Street, City, Zip</i>
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Adviser's Names	Occupational Preparation Program Teachers
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Name of Chapter President	Signature of Chapter President ➤	Date Signed <i>Mo./Day/Yr.</i>
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## FBLA GOALS

<ol style="list-style-type: none"> <li><b>Develop</b> competent, aggressive business leadership.</li> <li><b>Strengthen</b> the confidence of students in themselves and their work.</li> <li><b>Create</b> more interest in and understanding of the American business enterprise.</li> <li><b>Encourage</b> members in the development of individual projects that contribute to the improvement of home, business, and community.</li> </ol>	<ol style="list-style-type: none"> <li><b>Develop</b> character, prepare for useful citizenship, and foster patriotism.</li> <li><b>Encourage and practice</b> efficient money management.</li> <li><b>Encourage</b> scholarship and promote school loyalty.</li> <li><b>Assist</b> students in the establishment of occupational goals.</li> <li><b>Facilitate</b> the transition from school to work.</li> </ol>
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## EXAMPLE

Month	Local Goals	Activities	Goals	End-of-year Evaluation (1-5)	Comments
May	Show appreciation to businesspersons in the community.	Banquet for employers and community members who assisted with FBLA and business education program during the year.	6, 8.9	5	Community more aware of FBLA and willing to offer support.

			GOALS AND ACTIVITIES		
Month	Local Goals	Activities	Goals	End-of-year Evaluation (1-5)	Comments

## **End-Of-Year Report**

The follow-up to the program of work is the end-of-year report which includes two parts. The first part is an evaluation of the program of work as submitted to the FBLA state office earlier in the school year. To ensure that this is a learning activity for your chapter members, the evaluation should be prepared by the members and adviser together. Any other activities completed during the year and their corresponding ratings should be added.



**End-of-Year Report**  
**Career and Technical Student Organization**  
 (▼ Rev. 8/03)

**INSTRUCTIONS:** Complete and return no later than **May 15** to:

**WISCONSIN FBLA STATE OFFICE**  
**ATTN: ERIK SITTS**  
**125 SOUTH WEBSTER STREET**  
**P.O. BOX 7841**  
**MADISON, WI 53707-7841**

This form is available to download on the Wisconsin FBLA website. This form can be submitted electronically to the state office. Signatures are not required if submitted electronically--typed information for Chapter Adviser and Chapter President will be acceptable.

**School/Chapter Name**

### I. STRUCTURE OF REPORT

The End-of-Year Report consists of two parts:

1. Corrected and Rated Chapter Program of Work.
2. Completed Statistical Report *which includes two sections:*
  - a. Required Section.
  - b. Optional Section.

### II. PROGRAM OF WORK

Each chapter should have a copy of the Program of Work submitted last fall to the state office. It is suggested that the old and newly elected executive board members use the chapter copy as a guide in setting goals and developing a program of work for the next school year.

1. Adviser(s) and chapter members add chapter objectives and activities that do not appear on original Program of Work.
2. Adviser(s) and members rate each activity attempted on a scale of 1 - 4 (*1 = poor and 4 = superior*).
3. Underline the most worthwhile activity or activities of the year.
4. Return the previously submitted Chapter Program of Work with the Statistical Report. These two items become the End-of-Year Report.

### III. STATISTICAL REPORT

Class	Membership									
	Beginning of Year			End of Year						
	Male	Female	Total	Male	Female	Total		Male	Female	Total
1. Freshman							6. Number of FBLA members in occupational preparation program.			
2. Sophomore							7. Number of students in business education occupational preparation program.			
3. Junior							8. Number of teachers in Business Education Department.			
4. Senior							9. Number of teachers who share the responsibility of advising the FBLA Chapter.			
5. Grand Total							10. Cost of Local due per member			

### IV. CERTIFICATION

**I HEREBY CERTIFY** that the above information is true and correct to the best of my knowledge.

Signature of Chapter Adviser



Date *Mo./Day/Yr.*

Signature of Chapter President



Date *Mo./Day/Yr.*

## V. CHAPTER ACTIVITY EVALUATION

**Directions:** In evaluating your chapter activities, circle the appropriate number when applicable.  
4 = Superior; 3 = Above Average; 2 = Average; 1 = Needs Improvement. When appropriate check either yes or no.

### I. ATTENDANCE AT LEADERSHIP TRAINING CONFERENCE

	<u>Yes</u>	<u>No</u>	<u>If Applicable</u> <u>Circle Rating</u>			
A. Was your chapter represented at:						
1. Officer Training Workshop	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
2. National Leadership Conference	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
3. Fall Executive Board Meeting	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
4. National Fall Leadership Conference	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
5. Regional Leadership Conference	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
6. Spring Executive Board Meeting	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
7. State Leadership Conference	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
8. Other: <i>Specify</i> _____	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1

### II. PROGRAM OF WORK

A. Was your program of work planned early in the year, communicated to members and effectively carried out?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
B. Were your chapter activities based on the goals and purposes of FBLA?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
C. Did your program of work include activities in the five areas essential for a balanced program (e.g., business knowledge and skills, leadership and promotion, school and community service, financial, and social)?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
D. Were your FBLA activities a part of every business education class?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
E. Did your chapter participate in:						
1. The State Service Project - Project HELP?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
2. The National Project: Free Enterprise--Getting Involved	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
F. Did your chapter plan special activities for FBLA/Vocational Education Week?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1

### III. CHAPTER PROMOTION

A. Was your chapter involved in establishing or reactivating another FBLA chapter during the year?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
B. Did your chapter have a planned program for promoting FBLA in the school and in the community?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
C. Did your chapter plan activities especially designed to stimulate parent awareness through parent involvement?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
D. Did your chapter have activities that involved interaction with local business and professional groups?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
E. Did your chapter have activities that were jointly planned with other vocational student organizations?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
F. Did your chapter make use of the following to promote FBLA?						
1. Newspaper articles	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
2. Displays, bulletin boards, etc.	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
3. Assembly programs	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
4. Brochures	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
5. Slide presentations	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
6. Radio and TV spots	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
7. Billboards	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
8. Other: <i>Specify</i> _____	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
G. Did your FBLA chapter submit articles to the:						
1. <i>Badger Business Bulletin</i> ?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
2. <i>Tomorrow's Business Leader</i> ?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
H. Did your chapter increase its membership?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1



## V. CHAPTER ACTIVITY EVALUATION (cont.)

### IV. COOPERATION AND UNDERSTANDING

	<u>Yes</u>	<u>No</u>	<i>If Applicable Circle Rating</i>			
A. Were your chapter members interested, active, cooperative, and informed?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
B. Did each member appear and assist with a chapter activity during the year?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
C. Were efforts made to find and utilize the abilities of all chapter members?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
D. Did all business teachers serve as co-advisers and assist with FBLA activities?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
E. Did chapter members clearly understand FBLA goals, objectives, and values?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
F. Did chapter members recognize the opportunity for personal growth through FBLA?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1

### V. PROGRAM MANAGEMENT

A. Were your chapter meetings orderly and well planned?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
B. Were your reports kept on file?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
C. Were necessary reports and dues sent promptly to the state office?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
D. Did your chapter make effective use of the state and national FBLA handbooks and other releases from the state and national offices?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
E. Did the projects of your chapter help you achieve the goals you set?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1
F. Did your chapter use the evaluation for making future plans?	<input type="checkbox"/>	<input type="checkbox"/>	4	3	2	1

### VI. STATISTICAL REPORT (Optional)

- A. Number of years your chapter has been operating as a chartered chapter. \_\_\_\_\_
- B. When does your chapter hold its meetings? \_\_\_\_\_
- C. Number of scheduled meetings held by your chapter each year. \_\_\_\_\_

#### For Adviser Completion

Is your position as FBLA adviser a salaried position? ☐ ☐

Were you a member/officer of: *Check all that apply*

FBLA: ☐ Member ☐ Officer

PBL: ☐ Member ☐ Officer

## Point Systems

A point system is helpful in the analysis and evaluation of the participation of each member. It is sometimes used as the basis for attendance at the leadership conferences, awards, and other activities.

Here is a list of activities and suggested point range for each. The figures were derived from point systems used by various chapters.

<u>ACTIVITIES</u>	<u>POINT RANGE</u>
President	1-30
Vice-President	1-30
Secretary	1-30
Treasurer	1-30
Reporter	1-30
Historian	1-30
Parliamentarian	1-30
State Officer	1-30
Attendance at General Meetings During School	1-2
Attendance at Evening Meetings and Special Events	1-5
Attendance at State Events (state executive board meetings, leadership labs, etc.)	1-10
Leadership Conferences:	
Attendance	5
Project Work	1-5
Contestant	5-15
Placing in an Event	Bonus pts. may be given
Committee Chairperson (Standing Committees)	1-25
Committee Work	1-5 for each committee
Community Projects (Project HELP, Cancer Drive, etc.)	1-5
Fund Raising (points may be given for the dollar amount sold or time put in)	1 for every dollar sold to 1 for every \$10 sold - OR 1 for every hour worked to 1 for every 3 hours worked
Bookstore Manager(s)	10 or more
Bookstore Workers(s)	1 per hour or session
Skill help for the high school or community (helping with taxes, business plans, support services, computer work, etc.)	1-30 per project(s)

## Leadership Qualities

One of the chief objectives of FBLA is to develop strong, assertive leadership in its members so they may participate more effectively in the business and community life of which they will become a part.

Members must learn how to lead and participate in group discussions, preside at meetings, work on committee assignments, engage in competitive events, work effectively with others, and participate in other activities which contribute to the development of desirable leadership qualities.

FBLA members should be encouraged to develop leadership qualities.

A good leader...

- believes and understands the principles of democracy.
- believes the discussion group has the ability and right to make decisions and to select their own leaders.
- believes the group's decisions will be more readily accepted than decisions which are imposed upon the group by one individual.
- respects the rights and dignity of others.
- realizes that every person can make worthy contributions to society.
- accepts responsibility and works *within* the group.
- committed to the well being of all individuals, as well as the success of the chapter.
- praises immediately, and often, with sensitivity to group dynamics.
- communicates thoughts and feelings in a clear and understandable manner and verbalizes the ideas of the group(s).
- can think creatively, be visionary, problem solve, and make appropriate decisions.
- shows confidence, integrity, and trust for fellow group members.
- displays optimism and enthusiasm.
- remains open-minded and is willing to compromise on issues.
- shows initiative in guiding the group with sound and careful planning.
- understands current leadership and participatory concepts, and serves as a role model in utilizing the stated principles.

## **Records Management**

Records management is extremely important in the operation of an efficient chapter. Mailings from the state and national offices are frequent and contain some information needed immediately and some at a future date. The FBLA adviser should set up a records management system when the chapter is formed so that needed information is readily available to the adviser and the chapter members.

It will be helpful to keep records of chapter activities such as field trips, fund-raising projects, community projects, etc. These records can be particularly helpful when there is a change of advisers. Local school policy may determine procedures for chapter financial transactions.

# **Communication Skills**

## **The 11 C's OF WRITTEN COMMUNICATION**

Clear -	unambiguous; one reading should be sufficient to get the message
Correct -	facts must be right; no excuse for incorrect grammar or spelling
Concise -	message conveyed briefly and effectively
Complete -	all necessary data in logical order; no guesswork
Courteous -	say "please" and "thank you"; courtesy is genuine; flattery is counterfeit
Considerate -	write the kind of message you would like to receive
Confident -	be the authority without acting it; assume reader will do what he is asked
Cheerful -	no one likes bad news; whatever the burden, give it gracefully
Conversational -	write as naturally as you talk; avoid offensive familiarity
Clever -	there is little enough wit in the world, so share yours
Careful -	written words can carry implications never intended by the writer; avoid emotionally charged overtones which can offend the sensibilities of the reader

## **HELPFUL SUGGESTIONS ON BUSINESS WRITING**

1. All business correspondence should be keyed and a copy stored.
2. All outgoing correspondence must be neat and correctly formatted. Never send correspondence that is torn or soiled.
3. Make paragraphs short and easy to read.
4. Correspondence must be checked for spelling and grammar correctness.
5. Use the pronoun "you" and a minimum of "I's."
6. Avoid needless words and information.
7. All written correspondence must be signed.

## **WRITTEN COMMUNICATIONS FROM OFFICERS TO CHAPTERS AND COMMUNITY**

- print on letterhead
- include date
- include your name and office
- if questionnaire or other form, must include your name and address as “return to”
- if questionnaire or other form requiring a reply, a reasonable due date should be listed
- must be in “camera-ready” condition
- identify who is to receive the mailing (chapters in region or entire state? all state officers?)
- double check for accurate punctuation, spelling, word usage, etc.
- receive approval from adviser before sending
- remember that every written communication is a reflection of **you and FBLA**
- **send copy to state office!**

## **WRITTEN COMMUNICATIONS FROM STATE OFFICE**

- communications will be sent to officer and adviser at the school address

## **EVALUATING YOUR WRITTEN COMMUNICATION**

1. Does your communication **LOOK NEAT**? Is it faultlessly keyed, well spaced and balanced, and free of spelling and grammar errors?
2. Is it **EASY TO READ**? Is it concise, with short sentences and paragraphs?
3. Is the opening **PERTINENT** and **INTERESTING**, thus inviting further reading?
4. Is the communication **CLEAR** and **FORCEFUL**, not involved or cluttered with meaningless words and phrases?
5. Does it sound **NATURAL**, not stilted?
6. Have you remembered your **READER'S POINT OF VIEW**, keeping the reader's desires, needs, and requirements well in mind? Is the communication unbiased?
7. Have you told your reader **WHAT HE/SHE WANTS TO KNOW**? Have you completely answered all questions?
8. Have you avoided saying anything that might be **MISUNDERSTOOD**?
9. Does your communication sound **SINCERE**? Does it sound as though you are really trying to be helpful and considerate?
10. Is your communication **CONCISE**? Have you said what you needed to say **SPECIFICALLY AND TO THE POINT**?
11. Does each sentence and paragraph follow in natural sequence so your communication **READS EASILY**?
12. Have you used sound, logical **REASONS WHY** the reader should do as you suggest or ask?
13. Are the closing lines **STRONG** and **FORCEFUL** - likely to cause the reader to react favorable to your suggestions or proposals?

14. Is the communication friendly, likely to build GOOD WILL?
15. Is it the kind of communication YOU WOULD LIKE TO RECEIVE?
16. Never use ALL CAPS in e-mail. All caps in e-mail come across that you are angry.
17. When sending e-mail, be sure to include a custom signature to outgoing messages. It is good practice to include your name, title, organization, mailing address, phone and fax numbers, and e-mail address.

### **TELEPHONE CALLS TO AND FROM STATE OFFICE**

- state office staff will call advisers and students at the telephone number provided on the contact form
- advisers and officers are responsible to communicate with each other
- obtain permission of the school to place long distance calls prior to placing the calls

### **HOW TO USE A MICROPHONE EFFECTIVELY**

1. “Talk your speech.” Think of that friend or group of friends you wish to communicate to—be yourself. Take the time to “practice” on a recorder or videotape so that you can feel “comfortable”—you are simply using the microphone as a tool.
2. Use the microphone when you are practicing! Become used to your tones, listen for changes in volume—you will hear places where you may have talked too softly or too loudly or simply forgot you were using the microphone. Remember, the microphone will intensify any gradations in volume.
3. Find a pleasant way to “test” the microphone. Blowing into or tapping the “mike” can be annoying for the audience and establish a negative feeling. You want attention given to your positive presentation, not to the “mike”!
4. “Just speak at the mike” has been around for so many years it has acquired the respectability of a rule. Proper microphone technique requires a speaker to stand at least 12 inches away or to one side of it. If you get too close to the microphone it will pick up your breathing sounds and your audience will be blasted with hissing noises (S-s-S-s or Sh-Sh-Sh-Sh for the sibilants or “pop-pop-pop” at every hard letter you pronounce).
5. Have a place for your “speech aides” such as papers or cards or other notes. Even slight sounds can be amplified enough to distract your audience. Some speakers become comfortable in having a few cards with “one word or symbol” to remind them of the main message they wish to convey.
6. If the microphone is not easily portable or wireless, try not to move away or turn your head from the microphone. If you want to look around the audience for effect, make the microphone the pivot point and talk across the face of it when looking left or right.

7. Use enthusiasm to emphasize a statement—by facial or physical gestures, moments of silence, humor, and so on. No need to shout into the microphone to make a point.
8. Be considerate; and if you need to cough or clear your throat, turn away or back away from the microphone. If you feel the need, ask to have a glass of water available during your presentation.
9. Practice the use of good speaking skills. Words and phrases such as “like,” “uh,” “you know” and others can be avoided through concentration and positive effort.
10. The microphone is only a tool to help you—**the message** is the important thing! Feel **confident**, be **organized**, and **think positively**; **YOU WILL BE GREAT!**



# HOW TO CONDUCT A MEETING

Parliamentary procedure assists in preparing for leadership in the world of work. Regardless of the vocation people choose, they owe it to themselves and their chosen field of work to demonstrate their full potential of leadership qualities.

By learning to develop and present their own ideas through parliamentary procedure, members become more effective leaders and/or participants.

## **PURPOSES AND PRINCIPLES**

The purposes of parliamentary procedure are:

1. To enable the deliberative assembly (a gathering of individuals with similar interests) to conduct business with efficiency and harmony.
2. To protect the rights of each individual.

Accordingly, there are some basic principles to consider in achieving the above purposes:

1. Only one person may claim the attention of the meeting at one time.
2. Many motions are debatable. See the "Book."
3. Every member has equal rights; i.e., the right to vote.
4. The will of the majority must be carried out, and the rights of the minority will be preserved.

## **SUGGESTED ORDER OF BUSINESS FOR A CHAPTER MEETING** - "What's on the Agenda?"

Most groups establish a basic order of business for meetings. Below is a suggested order if your chapter has not adopted a standard order of business:

1. Call the meeting to order

"The meeting will come to order."

2. Recite Creed

3. Read and approve secretary's minutes

"The secretary will read the minutes of the last meeting." "Are there any corrections to the minutes?"  
"There being no corrections, the minutes will stand approved as read."

OR

If there are corrections: "are there any further corrections to the minutes?" "There being no further corrections, the minutes will stand approved as corrected."

4. Treasurer's report

After the report is presented by the treasurer, the chair asks: "Are there any questions on the treasurer's report? (Pause for questions, if any.) The treasurer's report will be placed on file for audit."

5. Officer and standing committee reports

The presiding officer and committee chairpersons should inform each other in advance of the meeting as to whether a particular committee will report. For those wishing to do so, the chair simply calls on the chairpersons of the committees for their reports in the order in which the committees are listed in the bylaws (if they are standing committees) or in the order of their creation (if they are special committees). "The \_\_\_\_\_ committee will now report."

6. Special committees reports

7. Unfinished business

The chairperson **does not** ask for unfinished business. All items of unfinished business are a matter of record (postponed from the previous meeting or not reached on the agenda of the last meeting before adjournment) and therefore the chair automatically mentions such items without asking. "The motion to purchase a computer was postponed to this meeting. Is there any further discussion on the motion...?" (state motion exactly as moved at previous meeting)

8. New business

"Is there any new business?"

(Members may propose new business. Each proposal must be disposed of before a new one is considered.)

9. Program

10. Announcements

11. Adjournment

When the agenda has been concluded, the chair may declare the meeting adjourned by general consent without taking the time for a formal motion and vote. "Is there any further new business?" (Pause for any main motions on new business.) "Since there is no further new business, the meeting will be adjourned." (Pause for announcements, etc.) After pause, "The meeting is adjourned."

## **MOTIONS**

A **motion** is a formal proposal by a member, in a meeting, that the assembly take certain action. There are generally four classifications of motions.

A **main motion** is a motion whose introduction brings business before the assembly. Only one main motion may be considered at a time.

A **privileged motion** does not relate to the pending business but has to do with special matters of immediate and overriding importance which, without debate, should be allowed to interrupt the consideration of anything else.

A **subsidiary motion** may be applied to a main motion, and to certain other motions, for the purpose of modifying them, delaying action upon them, or otherwise disposing of them. Since they relate to the question before the house, it is "in order" to propose a subsidiary motion when a main motion is still before the assembly. Always vote upon subsidiary motions before main motions.

An **incidental motion** arises out of a pending motion. It is usually related to the main question in such a way that it must be decided immediately, before business can proceed. An incidental motion may also sometimes arise out of another motion or item of business.

### **HOW TO MAKE A MOTION**

1. Member rises to address the presiding officer by title:

(Chair is used only if the presiding officer has no other title.) "Mr. (or Madam) President" or "Mr. (or Madam) Chair."

2. Member is recognized by the presiding officer:

Chair states member's name or nods. The member "has the floor" and is the only member entitled to present or discuss a motion at this time.

3. Member proposes a motion:

Introduce the motion by saying, "I move that..." followed by a statement of the proposal. The motion is not to be discussed until it has been seconded by someone and stated in full by the presiding officer.

4. Member seconds the motion:

Another member, without rising or addressing the chair, may say, "I second the motion." If no one seconds the motion, the chair may ask, "Did the chair hear a second to the motion?" If there is none, declare, "The motion is lost for want of a second."

5. The presiding officer states the motion in full:

When the motion has been properly made and seconded, the chair repeats it to the group, or "states the motion."

6. The members discuss or debate the motion:

After the motion has been stated by the chair, any member may discuss it. The member must be recognized by the chair as did the maker of the motion. The maker of the motion is recognized first if he/she wishes to speak.

7. The presiding officer takes the vote on the motion:

When all members have finished discussing the motion, the chair "puts the motion to a vote." The chair should ask, before taking the vote, "Is there any further discussion?" If no one wishes to speak, the discussion is closed. The chair will take the vote by announcing, "All in favor of the motion (STATE THE MOTION) say 'Aye'." Following response from the members, the chair says, "Those opposed say 'No'." If the chair cannot tell from the volume of voices which way the majority has voted, he/she says: "The chair is in doubt. Those in favor of the motion please rise." After counting, he/she says, "Be seated. Those opposed, rise. Be seated."

8. The presiding officer announces the result of the vote:

The chair states, "The ayes have it and the motion is carried" or "The noes have it and the motion is lost." As soon as the vote has been announced by the chair, another motion is in order.

### **AMENDMENTS** - "How to Change a Motion"

The purpose of an amendment is to modify the wording of a pending motion before the pending motion itself is acted upon. An amendment must always be germane; that is, it must have direct bearing on the motion in question. Some motions are not amendable.

There are three basic ways to amend:

1. To insert or add words or a paragraph. This **adds** something to the motion which it previously did not include.
2. To strike out words or a paragraph. This **deletes** or eliminates something which was initially included in the motion.
3. An indivisible combination of ways (1) and (2) having the following terms:
  - To strike out and insert (which applies to words).
  - To substitute (which is not applied to anything less than a complete paragraph of one or more sentences).

There are two types of amendments:

1. Primary amendment (or amendment of the first degree), which is an amendment to the main question.
2. Secondary amendment (or amendment of the second degree), which is an amendment to the amendment. (Secondary amendments must modify and relate directly to the primary amendment and not to the main motion.)

No amendment beyond one of the second degree is possible.

When you want to change a motion that is on the floor, you say "I move to amend the motion by (and state your change precisely)."

### **ORDER OF VOTING**

Amendments are voted upon in reverse order; that is, secondary amendments must be voted on before primary amendments, and the primary amendment must be disposed of before the question of the main motion may be considered.

1. The amendment to the amendment (secondary) is discussed (if necessary) and voted on.
2. After discussion (if necessary) the vote is taken **on the amendment to** the motion (primary). If the secondary amendment passed, then the primary amendment as amended is considered.
3. After discussion (if necessary) the original motion **as amended** is voted on. If the primary amendment passed, the vote is taken on the main motion as amended.

## **NOMINATING AND ELECTING OFFICERS**

To nominate a person for an office in your chapter, a member presents the person's name to the meeting by saying, "I \_\_\_\_\_ nominate for the office of \_\_\_\_\_."

### **1. Nominations from the floor.**

Nominations do not require a second. As a nomination is made, the chairman repeats it and the secretary records it. No member may nominate more than one candidate for each office until all who wish to make a first nomination have had an opportunity to do so. If there are no further nominations, the chair declares the nomination closed.

A motion to close nominations is not a necessary part of the election procedure and should not generally be moved. If such a motion is made, it always requires a two-thirds vote.

### **2. Nominations by nominating committee.**

If there is a nominating committee, it prepares a slate of candidates which it presents to the assembly. The names are then treated as if they had been nominated from the floor.

Further nominations may be made from the floor.

### **3. Voting on nominations.**

After the nominations are closed, members vote upon the names by the method prescribed in the chapter's bylaws.

**Always refer to the most recent version of *Robert's Rules of Order Newly Revised*.**

## Glossary of Basic Parliamentary Terms

**Adjourn** - To close the meeting when no motion is pending and there is no further business.

**Amend** - A motion to modify the wording—and within certain limits the meaning—of a pending motion before the pending motion itself is acted upon.

**Appeal** - To determine the assembly's attitude toward a ruling made by the chair.

**Call for the Orders of the Day** - A privileged motion by which a member can require the assembly (1) to conform to its agenda, program, or order of business; or (2) to take up a general or special order that is due to come up at that time.

**Chair** - Applies both to the person presiding and the station in the hall from which he or she presides.

**Commit** - Generally used to send a pending question to a relatively small group of selected persons—a committee—so the question can be investigated and put into better condition for the assembly to consider.

**Debate** - Discussion of the merits of a motion.

**Division of the Assembly** - When a member doubts the result of a voice vote or a vote by show of hands, the member can call for a Division of the Assembly, thereby requiring the vote to be taken again by rising.

**Division of a Question** - To divide a motion so that the parts of it may be considered separately.

**Lay on the Table** - To enable the assembly to lay the pending question aside temporarily when something else of immediate urgency has arisen.

**Limit or Extend Debate** - To limit debate by reducing the number or length of speeches or requiring that at a certain time debate shall be closed. To extend the limits of debate by allowing more and longer speeches.

**Nominate** - To suggest names to be considered for office.

**Obtain the Floor** - To obtain the floor, the member rises and addresses the chair. When the chair calls on the member, he or she can speak.

**Parliamentary Inquiry** - A question directed to the presiding official to obtain information on parliamentary law or the rules of the organization bearing on the business at hand. "Mr. (or Madam) President, I rise to Parliamentary Inquiry."

**Point of Information** - A request directed at the chair, or through the chair to another officer or member, for information relevant to the business at hand but not related to parliamentary procedure.

**Point of Order** - Calls attention to violation of parliamentary procedure. The member says, "Mr. (or Madam) President, I rise to a point of order." The chair may say, "Your point of order is sustained," or "Your point of order is denied."

**Postpone Definitely or to a Certain Time** - The motion by which action on a pending question can be put off, within limits, to a definite day, meeting, or hour, or until after a certain event.

**Postpone Indefinitely** - A motion that the assembly decline to take a position on the main question. Its adoption kills the main motion and avoids a direct vote on the question.

**Previous Question** - A motion to bring an immediate vote on one or more pending questions, thereby ending debate. "Mr. (or Madam) President, I move the previous question."

**Raising a Question of Privilege** - Permits a request or main motion relating to the rights and privileges of the assembly or any of its members to be brought up for possible immediate consideration because of its urgency.

**Recess** - A short intermission in the assembly's proceedings that does not close the meeting, and after which business will immediately be resumed at exactly the point it was interrupted.

**Reconsider** - To bring back for further consideration a motion that has already been voted on. The member moving to reconsider must have voted on the prevailing side of the question to be considered. The making of this motion is subject to time limits.

**Rescind** - To cancel or countermand a previous action.

**Suspend the Rules** - When an assembly wishes to do something it cannot do without violating one or more of its regular rules, it can adopt a motion to suspend the rules.

**Take from the Table** - To make pending again a motion or series of adhering motions that previously had been laid on the table.

## Minutes of a Meeting

The record of the proceedings in a regular business meeting is called the "minutes."

An accurate record of a business meeting is essential to insure members' rights. The secretary's minutes should always record what was done at the meeting and what was said. Opinions, favorable or otherwise, should not be recorded.

The first paragraph of the minutes should contain the following items:

- date, time, and place
- kind of meeting—regular or special
- name of person presiding
- name of organization
- name of secretary
- approval of the minutes of the previous meeting

The body of the minutes should contain (with a separate paragraph for each subject):

- all main motions whether adopted or rejected exactly as stated
- names of the members making the motions; the name of the seconder need not be recorded
- all points of order and appeals whether sustained or lost accompanied by the reasons

The last paragraph should include:

- hour of adjournment
- written signature of the secretary; the words "respectfully submitted" should not be used

### Treasurer's Report

At each meeting the president may ask for a "treasurer's report." This report may consist of a statement of the cash balance on hand. Such a report requires no action by the assembly but should be placed on file for audit.

A suggested form for a treasurer's report would include the following:

- balance report at the previous meeting
- a list and explanation of receipts/expenses
- the current balance

For further information, consult *Robert's Rules of Order Newly Revised*.



# **Sample**

## **Minutes of the Happyland FBLA Chapter**

**December 4, 20\_\_**

The regular meeting of the Happyland FBLA Chapter was called to order at 10:25 a.m., December 4, in Room 777 by President Mary White. The secretary was present. The minutes of the previous meeting were approved as read.

The treasurer reported a new balance of \$781.25. The report was placed on file for audit.

Service committee chair, Lee Gray, reported that the canned items collected at the last meeting were distributed Thanksgiving Day to the selected families.

Sales committee chair, Karen Blue, stated that all items from the sales kit had been received and picked up for delivery by the members.

Jim Green reported on moneys earned while assisting with inventory for Pleasant Company during Professional Week.

The motion to "purchase a camera with chapter funds" was taken from the table. After discussion, the motion passed. A committee of three consisting of Ed Black, Sue Redd, and Lynn Brown was chosen to purchase the camera.

Kathy Tanner moved that "the members make Christmas cards for residents of the Smiling Face Retirement Home." Bob Blackburn moved to amend the motion by adding the words "and fruit baskets" after the word "cards." The motion and amendment passed. All members would assemble in Room 711 next Friday evening at 7:00 p.m. to assemble the baskets and compose the cards using our computers.

The motion "to hold a bake sale on Thursday before the Christmas program" was proposed by Cindy Greene. The motion passed. Members were asked to leave all baked goods in Room 123.

Our advisers, Miss Greatperson and Mr. Niceguy, stated that there were several announcements posted on the bulletin board and in the computer network system and to read them before the end of the week.

The meeting was adjourned at 10:45 a.m.

Jim Candy, Secretary

**Sample**  
**FINANCIAL REPORT**  
**FUTURE BUSINESS LEADERS OF AMERICA**

**Treasurer's Report**

**December 18, 20\_\_**

Balance on hand, December 4, 20__	\$ 781.25
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Receipts

Proceeds from bake sale	\$ 34.71
Collections from American Fund Raising Kits	<u>3,495.50</u>

Total Receipts	<u>3,530.21</u>
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Total Funds Available	\$4,311.46
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Expenditures

Payment for fund-raising kits	\$2,097.30
Supplies for Christmas project for elderly	14.40
Postage	<u>2.00</u>

Total Expenditures	<u>2,113.70</u>
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Balance on hand, December 18, 20__	<u>\$2,197.76</u>
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# CHAPTER ACTIVITIES

The projects listed have all been used successfully by one or more FBLA chapters. Variations to these activities can also be employed; but it should be remembered that the more members involved in a project or participating in an activity, the more successful it will be. Remember also, when selecting project ideas, to vary the types of activities—service, educational, inter-chapter, fund raising, and recreational.

It is also important to keep in mind the diversity of your members and to be sure to accommodate the special needs of all when planning activities.

## **SERVICE PROJECTS**

Chapter service projects provide an opportunity for students participation within the community. Involvement in such projects represents a planned gift of time and/or money made by your chapter to benefit the community. Service projects are important if they are well planned and implemented. Service projects can strengthen your chapter and chapter members. As they work together they become aware of themselves, their responsibilities as citizens, and their roles as future business leaders. Students will recognize that business also plays an important role in meeting the service needs of the community.

With so many possibilities, it may not be easy to decide upon what service project to give your focus. Take the time, thought, and discussion in order to reach a final decision.

Know your community and what is really needed. Then have your members choose the project they feel will be of greatest service. Depending upon the project, it may be possible to work with another agency of the community, a nearby chapter, and/or civic group.

### **Examples of service projects include:**

Assisting with Community Projects:

- Computer training for senior citizens and/or others
- Collection of items for needy recipients (during holiday period)
- Holiday parties for various community groups
- Bike safety/rodeo (with local civic group and police)

Sponsoring March of Dimes (MOD) Projects (see following pages)

Contemporary activities involving local business/industry could involve shadowing, mentoring, field trips, etc. and would enhance current educational initiatives and curriculums.

### **March of Dimes Fund-Raising Ideas**

<i>Auction</i>	Auction off services of students, advisers
<i>Balloon Sale</i>	Sell MOD balloons at shopping centers, parks
<i>Carnival</i>	Have each club or class provide a fun or food booth
<i>Dance</i>	Ask a disc jockey's help to line up talent, publicity
<i>Earlybird Breakfast</i>	Partnership with vendor to sell "continental breakfast"
<i>Fashion Show</i>	Work with vendors and foreign language club(s)
<i>Haunted House</i>	Decorate and haunt an empty house for Halloween
<i>Jail and Bail</i>	"Arrest" students, teachers, media—Raise funds for release
<i>Miniwalk</i>	Short version of the Walkathon for the pre-schoolers
<i>Mystery Night</i>	After the game concept, with prizes, etc.
<i>Nickelodeon Night</i>	Arrange showings of popular old movies/cartoons
<i>Operation Jug</i>	Clubs/classes fill gallon jars with money
<i>Quiz Game</i>	Pattern your own after one of the TV shows
<i>Rock-A-Thon</i>	"Sponsors" contribute
<i>Swim-A-Thon</i>	"Sponsors" contribute
<i>Variety/Talent Show</i>	Round up local talent, use disc jockeys
<i>Walkathon</i>	The Biggest MOD activity; walkers get sponsors to contribute for each mile completed
<i>Year-End Ball</i>	Dedicate the last dance of the year to March of Dimes
<i>Professional Day</i>	Co-sponsor a professional seminar with community business(es) and technical college/university
<i>Creative</i>	Start an "annual" activity "invented" by your members

## **EDUCATIONAL PROJECTS**

FBLA is an *integral* part of the educational process. Educational activities are tools of instruction which reinforce what the students learn in the classroom and/or on the job.

*Examples of educational projects include:*

- Business/Technology Seminars
- Career Days
- Chambers of Commerce, Civic and Service Organizations
- Display of Awards
- Field Trips
- International E-mail Project
- Internet Searches
- Inservice Workshops
- Local Competitive Events
- Parliamentary Procedure Seminars
- PowerPoint Presentations
- Scholarships
- Speakers/Resource People

For ideas to incorporate FBLA educational activities into your classroom, refer to the section of this handbook, "Integrating FBLA Into The Curriculum."

## **INTER-CHAPTER PROJECTS**

Inter-chapter projects and activities improve the effectiveness of FBLA and help students become more ready for the transition from school to work and/or postsecondary education.

Teamwork with other FBLA chapters can be fun while at the same time beneficial in developing good human relations.

*Examples of inter-chapter activities include:*

- Dances
- E-mail exchanges
- Halloween party
- "Haunted House"
- Holiday greetings
- March of Dimes Activities
- Mini conferences
- Other school(s) invited to banquet
- Roller-skating & volleyball parties
- Speakers
- Travel together to conferences
- Web page design

## **FUND RAISING PROJECTS**

Fund-raising projects, while challenging to develop, should be part of the learning process for FBLA members. Two primary reasons for a fund-raising project are to strengthen the efforts of a service project and to add to the chapter's treasury for future events.

It takes work, time, and planning to carry out a successful fund-raising project. Money-making projects are limited only by the willingness and imagination of the chapter members in planning and sponsoring the projects—and requires the support of all members.

*Examples of fundraising projects include:*

### **Sales**

- Bake
- Candy
- Cheese
- Coffee/Donut (hot dogs)
- Freezer
- Fruit
- Garage
- Jewelry
- Pizza
- Plants
- Product (candles, kits)
- Skills of students
- Stationery

### **Other**

- Assist civic group
- Assist with setting up computer programs
- Birthday Cakes
- Car washes
- Community calendars
- Concessions at events
- Dances
- Input data or word processing for others
- Internet
- Mailings (Labels)
- Raffles
- School store

## **RECREATIONAL ACTIVITIES**

All work and no play is certainly not a part of the FBLA philosophy. Provisions should be made for activities that provide recreation, socializing, and just plain fun. However, it should be remembered that recreational activities may also be used to acquaint prospective members with business education and FBLA.

*Examples of recreational activities:*

- Banquets
- Holiday parties
- Parade floats
- Parent/student evening
- Picnics/Camping trip
- Recreational parties (roller-skating, bowling, ice skating, swimming, etc.)
- Staff Tea
- Tours
- Travel
- Treasure Hunt
- Y-Lock In

## **CALENDAR OF EVENTS**

Following is a sample calendar of events that can be used as a guide for yearly activities. Each chapter member should receive a copy.

## **Sample Calendar of Events**

September 7	First FBLA meeting at 12:10 p.m. - Room 123
September 13	Pizza Party/Mixer at Pizza Plaza (4:30-7:00 p.m.)
September 30	Meeting to issue money-making kits after school - Room 123
October 7	Executive Board Meeting - FBLA
October 16	Leadership Lab, Madison
November 1	Kits and orders due
November 9-11	National Fall Leadership Conference
November 14-18	Collection for needy families at Thanksgiving - Room 103
December 5	Gather orders after school - Room 123
December 19	Money due from kits
January 10	Joint meeting with PBL
January 17	Roller-skating Party (6:00-10:30 p.m.)
Jan or February	School Dance-Happiness Band
February 1	Meeting held at (local business)
February 3	Regional Leadership Conference
February 11-17	FBLA Week
February 13	Teachers' Tea in Library-Jazz Band
March 3	Executive Board Meeting - FBLA
March 16	St. Patrick's Day Pizza Party at Pizza Plaza
March 21	Meeting to discuss our March of Dimes activity
April 3	March of Dimes Activity
April 5-7	State Leadership Conference - Green Bay
May 2	Meeting to discuss the National Leadership Conference
May 17	FBLA and COOP Recognition Banquet
June	Senior/Alumni Party
July 1-5	National Leadership Conference

# PUBLIC RELATIONS

Webster defines public relations as...“the methods and activities employed in persuading the public to understand and regard favorably a person, business, or institution; the degree of understanding and favorable regard achieved.”

Thousands of businesses spend millions of dollars each year on public relations. The first rule for successful public relations people is to be sold on their product and/or service. The same applies to members of the largest, most active, and most productive career and technical student organizations interested in business education in the world! If you are proud of your organization, your chapter, yourself...it is a cinch that everyone else will be. Good public relations starts with each and every member. It is essential to have good public relations within your own chapter before you can “spread the word.”

FBLA does not stand apart from the life of your school or community. It is part of the community and should relate to it. One of the most important things FBLA members can learn is how to relate to others, to the community, and to the businesses in which they work now and in the future.

## **WAYS TO GENERATE PUBLIC RELATIONS**

Your chapter should involve and be involved with the school (other students, faculty and administration), with parents, with public officials in your community, with civic and other student organizations, with alumni (former FBLA members now assuming a role in the community), with media professionals, and with business and industry leaders. The following list of suggestions may be of value in generating public relations.

1. Use nametags, pins, blazers, or sweaters to identify FBLA members in a positive and professional manner.
2. Publicize upcoming events. You may wish to develop a listing of local news media. Utilize your computer systems for networking and records management needs. Perhaps you can fax or e-mail press releases to selected media people.
3. Develop and distribute literature and other materials about FBLA and business education.
4. Present programs about FBLA and about business education to civic and service groups in and around your community.
5. Develop promotional exhibits around school and community.
6. Display materials about FBLA in and out of school—superintendent’s office, Chamber of Commerce, guidance department, local businesses, etc.
7. Provide pictures of FBLA activities and members for school newsletter and yearbook.
8. Set up bulletin board and showcase displays of chapter and individual awards and projects.
9. Develop spot announcements, interviews, and question/answer discussions for local radio and television, and other appropriate media.
10. Provide photographs, news releases, editorials, feature stories, and letters to the editor for school and community newspapers.
11. Make announcements about FBLA and business education in daily bulletins to student body.



12. Invite community resource people to FBLA chapter meetings, banquets, and business education classes and activities.
13. Invite community resource people to participate on steering of advisory or focus committees.
14. Distribute certificates of deserved appreciation to individuals who contribute to FBLA and business education.
15. Provide tokens of appreciation for a variety of school and community employees.
16. Be active and positive members of a variety of volunteer activities not only as an individual, but as a representative of FBLA.

### **BADGER BUSINESS E-BULLETIN**

The elected state reporter's major responsibility is to publish Wisconsin's state newsletter, the *Badger Business e-Bulletin*. The *Badger Business e-Bulletin (BBB)* contains articles submitted by local chapters, letters from local and state officers, and general education material. It is a main responsibility of the local chapter reporter to write and submit these articles to the state reporter before the publication deadlines.

### **FBLA WEEK**

Like any other activity, the success of FBLA Week depends on careful planning. Select your committees early and start making detailed arrangements for activities. Have a plan for each day of FBLA Week. Divide the responsibilities among several committees and members. **Involve all members!**

Valuable public relations media to use during the FBLA Week include the school website, newspapers, radio, and television. News reporters are always looking for good news about students—so take advantage! Chapter members may get some ideas for FBLA Week activities from these suggestions.

1. Obtain FBLA Week proclamation(s) from your mayor or governing official. Provide picture and news stories for local media.
2. Communicate with community leaders telling them about your chapter activities and plans for FBLA Week.
3. Prepare a special FBLA exhibit for store windows, schools, libraries, airports, sports events, professional centers and offices, billboards, shopping centers and malls, and other places where people gather.
4. Contact civic and service organizations and make arrangements for members to appear on their programs. Use PowerPoint presentations, videos, and other media to explain the purpose and value of FBLA and business education.
5. Host an open house. Demonstrate what **competencies** are learned through classroom, on the job, and FBLA learning opportunities.
6. Conduct a tour of students' work sites to demonstrate to community residents the utilization of business education curriculum.
7. Hold an FBLA businessperson's breakfast (or luncheon).
8. Contact local businesses to sponsor advertising for a special FBLA section in the local newspaper. Work out the details with advertising professionals to provide an additional learning opportunity for members.
9. Sponsor a guest speaker for all students.

10. Invite recent graduates to attend a meeting and discuss with members their experiences in choosing a career, acquiring a position, and using the skills and knowledge of business education.
11. Send information to local businesses about FBLA—perhaps they could provide the materials to their employees through payroll mailings.
12. Select and install an honorary member into your chapter.
13. Conduct a membership drive to increase the total number of involved members in your chapter—including alumni and professional members.
14. Invite parents, teachers, school administrators, and other school staff to attend your chapter meeting during FBLA Week.
15. Prepare and distribute a special FBLA newsletter. Share a copy of it with state staff.
16. Design and display at least one FBLA Week bulletin board.
17. Attend and participate in the Regional Leadership Conference in your area.
18. Invite neighboring FBLA chapters to collaborate with your chapter in a recreational event—perhaps include other CTSO chapters to develop an “annual event.” They could include those within your school, local technical college, and colleges and universities.
19. Use a local or state FBLA video, PowerPoint, or slide presentation at a general assembly or in classrooms. An FBLA officer can answer questions.
20. Host a coffee/tea hour after school for all school staff to distribute FBLA materials.
21. Compose a survey and mail/e-mail to the other FBLA chapters in the state or your region to determine their FBLA Week activities. Implement those that you feel fit your chapter and members’ objectives and goals.
22. Sponsor a field trip for the citizens who need extra assistance to provide them an opportunity of acquainting them with businesses and FBLA.
23. Make Valentine’s Day tray favors using the FBLA emblem for hospitals and health care centers.
24. Provide skills of students to local businesses for the week.
25. Work with middle and elementary schools to promote FBLA.

# LEADERSHIP CONFERENCES

## REGIONAL LEADERSHIP CONFERENCE

Wisconsin is divided into six regions with Regional Leadership Conferences being held each year on the first and second Saturdays in February. These conferences are **hosted by the regional vice presidents who were elected at the previous Regional Leadership Conferences**. A map showing the regions is included in this section.

Attendance at these conferences **is not limited**. The conferences include competitive events, election of regional vice presidents, a general session, special-interest sectionals, and an awards program.

After a chapter has been chartered by the national office, a copy of the current year's "Competitive Events Guidelines" is mailed to the adviser by the state office. Specific information concerning all competitive events and the number of contestants advancing to the State Leadership Conference are included in these guidelines.

## STATE LEADERSHIP CONFERENCE

The State Leadership Conference is a three-day conference held each year in April. Depending on the competitive event, either the first- through fifth-place winners or the first- through third-place winners from each Regional Leadership Conference may participate in the competitive events at the state level. The first-place, and in many instances the second-place, winners in all events with a national counterpart are eligible to advance to the National Leadership Conference.

In addition to the competitive events, the conference includes business meetings, election of officers, special-interest sectionals, awards program, installation of state officers, and other planned activities.

Attendance at the State Leadership Conference **is limited**; consult the guidelines for specific details.

## NATIONAL LEADERSHIP CONFERENCE

The National Leadership Conference is held during the summer months in a major selected city in the United States. All advisers and members are eligible to attend. The first-place and eligible second-place winners at the State Leadership Conference advancing to national competition and newly elected state officers receive some financial assistance from Wisconsin FBLA. **The state office is NOT responsible for travel, housing, and other needs associated with attending the National Leadership Conference.** However, prior to the National Leadership Conference, the state office will compile housing information for a state block profile.

In addition to the competitive events, the conference includes business meetings, election and installation of national officers, special-interest sessions, awards program, tours of the selected city, and other planned activities.

### **NATIONAL FALL LEADERSHIP CONFERENCE**

The United States is divided into five regions. Wisconsin is part of the North-Central Region, which also includes Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, and Ohio.

The National Fall Leadership Conference is held each November. The conference consists of general sessions, special-interest sessions, banquet, tours of the area, and other planned activities.

\* \* \* \* \*

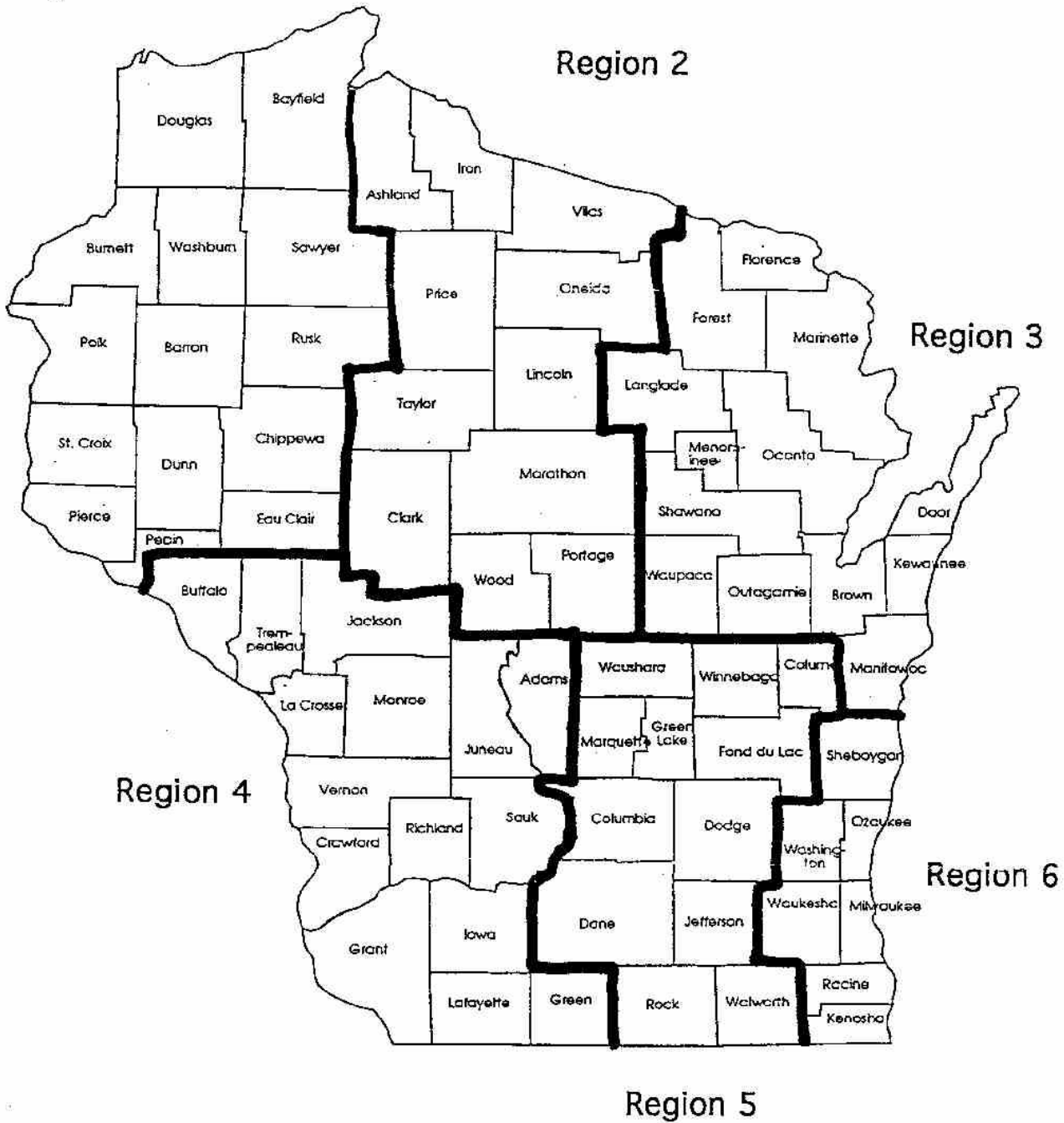
At all leadership conferences, advisory committee members and other community businesspersons provide leadership and serve as resource people for the special-interest sectionals.

Winners are recognized at all levels of competition. Students receive certificates; plaques; and in some events, scholarships.

\* \* \* \* \*

# FBLA REGIONS

Region 1



# INTEGRATING FBLA INTO THE CURRICULUM

In an attempt to share ideas on how FBLA can and should become a part of the school day and the business education curriculum, the following ideas are offered to assist with this implementation.

It should be indicated that every chapter, every adviser, and every member may suggest new ideas that should become a part of the instructional program. Use the suggestions to build your chapter and create an interest in the organization of, by, and for students enrolled in business education programs.

Why not try a few of these ideas?

1. For keyboarding warm-up exercises, supply students with items that contain current information about the activities of FBLA.
2. Consider the various educational reports and initiatives, and make every effort to provide students, during their FBLA activities, the opportunity to develop the skills and competencies mentioned as critical— decision making, problem solving, listening, team building, etc. You may want to:
  - work with your local chamber and/or economic development people on a project for the community
  - assist with a local business expansion project
  - help with developing brochures and other items for community need
  - work with other civic organizations in helping with one or more community need

Monitor and evaluate the activities based upon the specific competency and skill development expected for both the chapter and individual members.

3. Have your chapter and members volunteer to use their computer skills (desktop publishing, data entry, etc.) on behalf of other school groups and community organizations. Develop creative and innovative materials in preparing and printing programs, as well actually doing the planning and printing for FBLA conferences, meetings, workshops, and more.
4. Provide for MAD (Meet And Discuss) opportunities for your members to “brainstorm” how they feel they can utilize what they are learning within their classrooms through FBLA activities. Perhaps have a single concern (serving single parent children, civic pride, environmental issues, bicycle safety, ?) to keep student discussion “focused.”
5. Assist with writing/keying business plans for entrepreneurs who are attempting to acquire capital. Formatting, graphics, and other needs could be completed by the students—while learning more of the process of developing a new business venture. Ethics and confidentiality would also be part of the learning process.
6. Assist a local business, as a fund-raising possibility, to enter data and/or information—could include a business consulting firm that needs brochures developed, curriculum keyed, mailers and/or surveys completed, etc.
7. As part of your automated accounting curriculum, have students develop ways to automate your FBLA accounting procedures.
8. When requesting a variety of assigned correspondence within various curriculums, i.e., memos, letters, surveys, telephone skill development, follow up, e-mail, facsimile, etc., complete needed FBLA responsibilities as part of the learning process.

9. Provide a “seminar” for local businesses and civic groups in using proper parliamentary procedures for specific business meetings. Many skills would be needed by the chapter members and would include planning, scheduling, program/agenda development, and more. Could work with other local professionals or civic groups in the hosting of this activity.
10. Host “career times” for students which could include: “mock interviews” by local business people, round table discussions of new and emerging careers, how to put together “resumes that work,” and more. Could invite chapter members, other students of school, and community people who need help in changing careers.
11. Utilize computer records management concepts for keeping track of all FBLA correspondence.
12. Consider co-hosting a “Business After 5” meeting with a local business and/or chamber. Most communities have a process for involvement in this type of activity through chambers or economic development groups.
13. Establish “consulting teams” of members within your chapter and provide them with ongoing challenges that confront your chapter, school, community, etc.
14. Continue the current initiatives (Tech Prep, Applied/Integrated Instruction, Cooperative Learning and much more) in developing creative and effective ways to enhance the skills and knowledge through a variety of FBLA activities.

# APPENDIXES

- Appendix   A -   FBLA-PBL Fact Sheet
- B -   Career and Technical Student Organizations
- C -   Wisconsin Chapter Constitution & Bylaws
- D -   Chapter Ceremonies
- E -   Terminology



## Appendix A

### FBLA-PBL Fact Sheet

FUTURE BUSINESS LEADERS OF AMERICA-PHI BETA LAMBDA is a non-profit career and technical student organization interested in or preparing for careers in business or business education. It is composed of three divisions: FBLA at the secondary level, and PBL at the post-secondary and college level, and Professional. There are approximately 235,000 active members in over 6,200 chartered chapters across the nation.

FBLA gives students the chance to learn, first hand, about the business community as they prepare to become a part of it by developing competencies. They learn to lead and participate actively in group discussions, preside at meetings and conferences, work effectively within teams, and engage in practical problem-solving and decision-making.

Chapter advisers and advisory committees—composed of school officials, appropriate businesspersons and other community representatives—help students become more aware of the intricacies of the American free enterprise system, global competition and interdependence, and how it affects their lives in the present and future.

Projects involving FBLA-PBL members include professional, civic, service, career development, and social awareness activities. State advisers help to coordinate the numerous chapter activities. They, in turn, report to the national association headquarters in Reston, Virginia, outside Washington, D.C. Headed by the President and Chief Executive Officer (Jean M. Buckley), the national staff works to help chapters and advisers and acts as liaison among student organizations, professional and business organizations, and government agencies.

Since competition is recognized as a major part of the free enterprise system, FBLA-PBL sponsors a National Leadership Conference (NLC) which begins with competition at the local, regional, and state levels. Inter- and intra-chapter warm-ups prepare members for the NLC, which emphasizes individual and team effort with awards for those who excel in both.

FBLA-PBL is financed almost entirely by dues and local chapter fund raising. Donations and grants also play an important part.

Publications supplied include *Tomorrow's Business Leader*, a student oriented magazine; *FBLA Adviser's Hotline*, a newsletter for advisers; program packets with suggested projects to be developed at the local level; and an organizational manual. In addition, billboards, posters and brochures are included in supplemental materials provided by the national office.

The FBLA concept was developed in 1937 by Hamden L. Forkner of Teachers College, Columbia University, New York City. In 1940 FBLA became a part of the national Council for Business Education. The first chapter, in Johnson City, Tennessee, began in 1942.

MAILING ADDRESSES:

National: FBLA-PBL, Inc.  
1912 Association Drive  
Reston, VA 20191-1591  
**1-800-325-2946 (FBLA WIN)**

State: Wisconsin FBLA State Office  
125 South Webster Street  
PO Box 7841  
Madison, WI 53707-7841  
**1-608-266-2348 (State Chair)**  
**1-608-267-0361 (State Adviser)**  
**1-608-267-9259 (State Program Assistant)**  
**1-608-267-9275 (FAX)**

E-MAIL ADDRESSES:

National: [general@fbla.org](mailto:general@fbla.org)  
[market@fbla.org](mailto:market@fbla.org) (MarketPlace)

State: Lisa Olson, State Chair  
[lisa.olson@dpi.state.wi.us](mailto:lisa.olson@dpi.state.wi.us)

Erik Sitts, State Program Assistant  
[erik.sitts@dpi.state.wi.us](mailto:erik.sitts@dpi.state.wi.us)

WEB ADDRESSES:

National: <http://www.fbla-pbl.org>

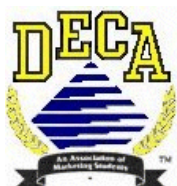
State: <http://www.dpi.state.wi.us/dpi/dlsis/let/fbla.html>

## Appendix B

### Career and Technical Student Organizations

The Department of Public Instruction recognizes the following career and technical student organizations:

#### SECONDARY LEVEL



**DECA** (An Association of Marketing America) prepares students for rewarding careers in marketing, management, and entrepreneurship. Students achieve personal and professional success through academic and leadership activities.



**FBLA** (Future Business Leaders of America) mission is to bring business and education together in a positive working relationship through innovative leadership and career development programs. Co-curricular activities for high school students include career exploration, civic service, economic education, and fostering entrepreneurship.



**FCCLA** (Family, Career and Community Leaders of America) helps young men and women become strong leaders in families, careers and communities through family and consumer education. The mission of FCCLA is to promote personal growth and leadership development. Focusing on the multiple roles of family member, wage earner and community leader, members develop skills for life through character development, creative and critical thinking, interpersonal communications, practical knowledge and vocational preparation. Many co-curricular activities are provided through FCCLA.



**FFA** (An Association of Agriculture Students) makes a positive difference in the lives of students by developing their potential for premier leadership, personal growth and career success through agriculture education. There are over 250 FFA chapters in Wisconsin with over 16,300 members.



**HOSA** (Health Occupations Students of America) provides opportunities for students to plan, prepare and participate in educational experiences that focus on health careers.



**SkillsUSA-VICA** (Vocational Industrial Clubs of America) prepares America's high performance workers currently enrolled in technical and technology education programs. Tomorrow's workers participate in team work, citizenship, leadership and character development activities. Over forty industry sponsored competitive events are featured at the state conference. SkillsUSA emphasizes total quality of work: high ethical standards, superior work skills, lifelong education, pride, and dignity of work. Award winning programs include: Total Quality Curriculum and Professional Development Program.

Cooperation and involvement with other career and technical student organizations can enhance local chapter activities while promoting the common goals of these organizations. The following list may give your chapter members some ideas for planning activities.

1. Share in transportation and attendance at workshops and leadership labs.
2. Co-sponsor professional workshops for the community or school. Use special skills of the various CTSO's members in order to integrate curriculum competencies in the planning and implementation activities.
3. Share in the construction and cost of building parade floats or school display materials.
4. Co-sponsor a "career night" for all students. Point out the interdependence found in the "real world" of work.
5. Co-sponsor an awards night for "non athletic organizations."
6. Participate together in community service projects (i.e., March of Dimes, Muscular Dystrophy, Needy Families, etc.)
7. Cooperate in developing a plan to welcome new students to your school, providing them with information that will make them feel welcome, AND know more about your FBLA chapter.
8. Share in projects for people in need.
9. Work on professional workshops/in-services together; along with technical college organizations.
10. Publicize curriculum projects and corresponding chapter activities during Career and Technical Education Week in February.

## POST-SECONDARY LEVEL

Business education students have the opportunity to continue their involvement in a vocational student organization at the post-secondary level. Wisconsin recognizes the following organizations:



Phi Beta Lambda (PBL)-oriented to business occupations for college or university students



Business Professionals of America (BPA)-oriented to business occupations for vocational, technical school students

Local FBLA chapters are encouraged to utilize the expertise of the members of the post-secondary career and technical student organizations. Some suggestions are listed below.

1. Invite these people as speakers, judges, panelists, mentors, counselors, consultants, evaluators, etc.
2. Share the sponsorship of service projects.
3. Participate in competitive events sponsored by these chapters.
4. Co-sponsor professional level activities.
5. Arrange a tour of a post-secondary campus, and joint meeting.
6. Ask them to serve as advisory committee members
7. Work on innovative and integrated activities, i.e., set up computer networks between classrooms, establish joint budgets for specific activities, fund raise jointly, etc.
8. Hold joint alumni meetings.

Information concerning these post-secondary organizations can be obtained by contacting the state office.

## Appendix C

### Wisconsin Chapter Constitution

#### Future Business Leaders of America - Phi Beta Lambda, Inc.

##### Article I. Name

The name of this organization shall be the Wisconsin State Chapter of the Future Business Leaders of America-Phi Beta Lambda, Inc., hereinafter referred to as "the Chapter."

##### Article II. Purpose

The purpose of this FBLA Chapter shall be to further the goals of FBLA within the state of Wisconsin. The Chapter shall provide as an integral part of the instructional program additional opportunities for secondary students (grades 7-12) in business and/or business-related fields to develop vocational and career supportive competencies and to promote civic and personal responsibilities.

The purpose of this PBL Chapter shall be to further the goals of PBL within the state of Wisconsin. The Chapter shall provide opportunities for postsecondary and college students to develop vocational competencies for business and office occupations and business teacher education. PBL is an integral part of the instructional program and in addition promotes a sense of civic and personal responsibility.

The specific goals of FBLA-PBL and the Chapter are to:

- **Develop** competent, aggressive business leadership.
- **Strengthen** the confidence of students in themselves and their work.
- **Create** more interest in and understanding of the American business enterprise.
- **Encourage** members in the development of individual projects that contribute to the improvement of home, business, and community.
- **Develop** character, prepare for useful citizenship and foster patriotism.
- **Encourage and practice** efficient money management.
- **Encourage** scholarship and promote school loyalty.
- **Assist** students in the establishment of occupational goals.
- **Facilitate** the transition from school to work.

The Chapter shall not have any purpose nor engage in any activity inconsistent with the status of an educational and charitable organization as defined in Section 501(c)(3) of the Internal Revenue Code of 1954 or any successor provision thereto, and none of these goals shall at any time be deemed or construed to be other than the public benefit purposes and objectives consistent with such educational and charitable status, nor shall the Chapter adopt goals or engage in any activity inconsistent with the goals and policies of FBLA-PBL, Inc.

### **Article III. Membership**

The membership of the Chapter shall consist of FBLA or PBL members residing within the state of Wisconsin. Classes of membership identical to those established by FBLA-PBL, Inc., shall be established by the Chapter. Such classes, together with the voting and other rights of each, may be more specifically set forth in the Bylaws.

### **Article IV. Dues and Finance**

**Section 1.** The Chapter may assess dues from the members in addition to dues assessed by FBLA-PBL, Inc.

**Section 2.** No part of the net earnings of the Chapter shall inure to the benefit of any member, sponsor, donor, creator, director, officer, employee, or any other private individual or to the benefit of any corporation or organization, any part of the net earnings of which inure to the benefit of any private individual; provided, this shall not prevent payment of reasonable compensation for services actually rendered the Chapter in effecting its goals. The Chapter shall not divert any part of its income or corpus to any member, sponsor, donor, creator, director, officer or employee; by lending any part of its income or corpus without receipt of adequate security and a reasonable rate of interest; by paying any compensation in excess of reasonable allowance for salaries, or other compensation for personal services actually rendered; by making any purchase of security or other property for more than adequate consideration for money or money's worth; by selling any substantial part of its securities or other property for less than adequate consideration for money or money's worth; or by engaging in any other transaction which, either directly or indirectly, results in such diversion of its income or corpus. The Chapter shall not make any accumulation of its income unreasonable in amount or duration.

**Section 3.** The Chapter shall not use any income for purposes other than the objects in this Constitution set forth or invest any income in any manner which might jeopardize the fulfillment or carrying out of its objects. The Chapter shall not devote a substantial portion of its activities to carrying on propaganda or otherwise attempting to influence legislation, and in no event shall the Chapter engage in any legislative activities other than those in direct furtherance of the Chapter's stated objectives. The Chapter shall not participate in or intervene in any political campaign on behalf of any candidate for public office. In general, the Chapter shall not act in any way or engage in any activity which might affect its right or the right of FBLA-PBL, Inc. to full tax exemption or the right of donors to the Chapter of FBLA-PBL, Inc., to full tax deduction for their contributions to the Chapter or FBLA-PBL, Inc., and the Chapter shall be so operated as to be entitled to and receive all tax exemptions, federal or local, which may be granted to charitable, scientific, or educational associations or foundations.

### **Article V. Organization**

**Section 1.** The Chapter is a subsidiary of the Future Business Leaders of America, Phi Beta Lambda, Inc. As an integral part of FBLA-PBL, Inc., the Chapter shall have goals and engage in activities consistent with the organization's status as a charitable and educational organization as defined in Section 501(c)(3) of the Internal Revenue Code of 1954. Reports shall be submitted to FBLA-PBL, Inc. as requested.

**Section 2.** The Chapter shall be governed by a Board of Directors which shall serve as the policymaking body for the Chapter, and which shall be subject to this Constitution, the FBLA or PBL Bylaws, and the Board of Directors of FBLA-PBL, Inc.

**Section 3.** The Chapter shall adopt a set of Bylaws consistent with this Constitution, which shall include the powers and duties of the Board of Directors, officers and elections, meetings of the chapter, and any other provisions necessary for the orderly administration of the Chapter.

**Section 4.** The Chapter shall maintain such relationship with FBLA or PBL local chapters within the state of Wisconsin as shall be approved by the Board of Directors. The Chapter may apply to the Internal Revenue Service for a group tax exemption ruling on behalf of the local chapters within the state.

**Section 5.** Upon dissolution, all the assets of the Chapter shall be and remain the assets of FBLA-PBL, Inc.

## **Article VI. Emblems and Insignia**

The Chapter emblems shall be the emblems of the national association. Only members in good standing may use official emblems and insignia.

## **Article VII. Amendment**

This Constitution is a mandatory Constitution drafted by FBLA-PBL, Inc. for adoption by its state chapters and shall be unamendable without the written consent of FBLA-PBL, Inc. Should amendments be required for the purpose of qualifying or retaining qualification under Section 501 (c)(3) of the Internal Revenue Code of 1954 or any successor provision thereto, such amendments, as approved by the Board of Directors of FBLA-PBL, shall become a part of this Constitution with or without the consent of the Chapter.

## **Article VIII. Bylaws**

### **Section 1. Membership.**

FBLA membership shall consist of members of chartered local chapters. These members shall hold membership in their local, state, and national chapters. Local, state, and national FBLA chapters shall be open for membership to the four following classes of members:

**Active Members** shall be secondary students who become members while enrolled in business and/or business-related fields who accept the purpose of FBLA, subscribe to its creed, demonstrate willingness to contribute to good school-community relations, and possess qualities for employment. Active members shall pay dues as established by local, state, and national FBLA and may participate in all events, in accordance with the guidelines of the awards program, serve as voting delegates to leadership conferences, hold office, and otherwise represent their local or state chapters as approved by their respective local or state advisers.

**Professional Members** shall be persons associated with or participating in the professional development of FBLA as approved by the state chapter. Such members may include local and state chapter advisers, business teachers, business teacher educators, state supervisors of business and office education, employers or supervisors of cooperative work-training students, advisory council members, business persons, and other persons contributing to the growth and development of FBLA. Professional members shall pay dues as established by FBLA, but shall not participate in events, serve as voting delegates, or hold office.



**Honorary Life Members** may be elected to a local or state chapter by a majority vote. They shall be persons who are assisting in the advancement of business and/or business-related fields and/or who are rendering outstanding service to the local or state chapter. Honorary life members shall not vote or hold office and shall not be required to pay dues.

**National Honorary Life Members** may be recommended by the membership and shall be accepted upon approval by the Board of Directors of FBLA-PBL, Inc. They shall be persons making significant contributions to the field of business and office education and/or to the growth and development of FBLA-PBL, Inc. National honorary life members shall not vote or hold office and shall not be required to pay dues.

## **Section 2. Dues and Finance.**

- A. Dues. State dues based on fiscal reports by the state office and on recommendation by the state executive board shall be determined by a majority vote. State dues and national dues of members shall be forwarded directly to the national office by the local chapter. Wisconsin is a "Non-Direct" membership state and, therefore, a payment for dues must be made to both National FBLA and Wisconsin FBLA.
- B. Annual state dues shall be \$3.00 with \$2.00 going to The Wisconsin FBLA-PBL Foundation, Inc.
- C. The affairs and property of FBLA shall be managed by the National Board of Directors according to D. C. Code 29-1018 (1967 ed.).
- D. Finance. The state staff shall administer all FBLA finances, submit an annual budget to the state executive board for approval, and provide the National Board of Directors and members with an annual audit.
- E. The fiscal year of the Future Business Leaders of America shall be July 1 through June 30.

## **Section 3. Organization.**

- A. The state chapter shall be an association of local chapters, each operating in accordance with the charter granted by FBLA-PBL, Inc. Only chapters in good standing shall be referred to as "Future Business Leaders of America." Chapter charters and numbers shall be issued to each FBLA chapter by FBLA-PBL, Inc.
- B. The state executive board shall consist of state officers and one adviser from the state officer's school. Each member of the state executive board shall have one vote. The state president chairs the executive board meetings.
- C. The state staff from the Department of Public Instruction shall serve in an advisory capacity to the state executive board.
- D. There shall be six regions in the state of Wisconsin.
- E. Local chapter charters shall be issued upon approval of the state office and acceptance by the national office. The state chapter shall hold at least one annual leadership conference to elect state officers and conduct business.
- F. The position of state chairperson shall be filled by recommendation of the President and Chief Executive Officer and approval of the board of directors of FBLA-PBL, Inc.
- G. Each local chapter shall have an adviser who is teaching a business/business-related course. A local chapter may have as many special-emphasis groups under the chapter charter as it deems necessary to meet the interests of all students. The local chapter of FBLA shall assume full responsibility for coordinating the program for these interest groups.
- H. The State Superintendent's Business Education/FBLA Advisory Committee shall serve in an advisory capacity to the state chapter.

## **Section 4. Emblems and Colors.**

- A. The official emblem and insignia item designs are described and protected from infringement by registration in the U.S. Patent Office under the Trademark Act of 1946. The manufacture, reproduction, wearing, or display of the emblem shall be governed by the National Board of Directors.

- B. Emblems and insignia shall be uniform in all local and state chapters and within special-emphasis groups; they shall be those of FBLA. Only members in good standing may use official emblems and insignia.
- C. The official colors of FBLA shall be blue and gold.

## **Section 5. Amendments.**

Proposed amendments to these bylaws shall be submitted in writing not later than January 15 to the state office by local chapters or by a state officer. Proposed amendments shall be reviewed by the state executive board and must be approved by the state executive board before they can be submitted to the voting delegates. Notice of proposed amendments shall be sent to local chapters. The state executive board shall present approved proposed amendments, with recommendations, to the voting delegates at the State Leadership Conference. A two-thirds vote of the voting delegates registered at the State Leadership Conference and in attendance at all business meetings is required for adoption.

## **Section 6. Officers and Elections.**

- A. State Officers. The state elected officers of FBLA shall be a president, vice president, vice presidents representing the respective regions, a secretary, treasurer, and a reporter.
- B. Qualifications for State Office.
  - 1. Only active members are eligible to hold state office.
  - 2. Only those applicants who are present at the leadership conference and officially certified by the officer screening committee shall be eligible for nomination.
  - 3. To be considered for an office in FBLA, a candidate shall:
    - a. Have at least one full year remaining in his/her secondary business program.
    - b. Be recommended by the chapter and endorsed by his/her local chapter adviser, parents, and school official.
    - c. File an official application before the deadline established by the state office. Candidates for secretary must have completed, or will complete, typewriting/keyboarding by the end of the current school year and possess the ability to take minutes according to *Robert's Rule of Order Newly Revised*. Candidates for treasurer must have completed, or will complete, one year of accounting, bookkeeping, or record keeping by the end of the school year of their nomination.
- C. Nominations.
  - 1. Candidates who have filed an official application prior to the established deadline will be presented at a general session of the leadership conference. In the event there are no candidates for an office, nominations will be accepted following the conference by mail, and elected by mail plurality vote.
  - 2. In the event that there are no candidates for an office at the State Leadership Conference, candidates may choose to run for that office prior to the officer screening providing they are qualified for that office.
  - 3. Only candidates approved by the officer screening committee shall be nominated.
- D. Elections.
  - 1. The president, vice president, secretary, treasurer, and reporter shall be elected annually at a general session of the State Leadership Conference by the local voting delegates. The regional vice presidents shall be elected annually at their respective RLCs by the local voting delegates and shall be installed at the State Leadership Conference.
  - 2. These officers shall be elected by a ballot vote of voting delegates. A majority vote shall be required for election. If no candidate for an office receives a majority vote on the third ballot, the candidate receiving the lowest number of votes for that ballot shall be dropped from the fourth ballot. If necessary, the candidate receiving the lowest number of votes shall be dropped from each subsequent ballot until one candidate receives a majority of the votes. In the event there is only one candidate for an office, the candidate may be elected by a standing vote.
  - 3. The order of elections shall be president, vice president, secretary, treasurer, and reporter.
  - 4. No two state officers shall be elected from the same local chapter. Officers may succeed themselves in the same office.

- E. Term of Office. State officers shall be elected for one year or until their successors are elected or appointed, and their term of office shall begin at the close of the State Leadership Conference.
- F. Vacancy in Office.
  - 1. A vacancy in any office, other than that of president or regional vice president, shall be filled by the candidate receiving the next highest votes and meeting qualifications of the office. (EXAMPLE: The reporter candidate receiving the second highest number of votes becomes the state reporter should the first-place elected reporter be unable to fulfill his/her officer responsibilities.)
  - 2. In the case of no qualified candidates for the office, the officer will be chosen in order of election and highest votes. (EXAMPLE: No qualified candidates for the office of treasurer remain. The second highest scoring presidential candidate, qualifying for the office of treasurer, then becomes the state treasurer.)
  - 3. If there are no qualified candidates to fill a vacancy, an officer will be appointed by the state staff. (EXAMPLE: If no one meets the typing and transcription qualifications for the office of state secretary, or all candidates left already have an officer from that school, an officer is then appointed by the state staff.)
  - 4. Should the office of president become vacant, the vice president shall automatically become president.
  - 5. Should the office of regional vice president become vacant, the adviser from that local chapter shall first try to appoint another regional vice president from his/her own chapter. If the adviser is unable to find another regional vice president in his/her own chapter, he/she will then contact the candidate receiving the next highest number of votes to fill this position. Should the candidate refuse the office of regional vice president, or if there is already an officer from that school, the state office will assist in the selection of a new regional vice president. The new regional vice president and his/her adviser will accept executive board duties.
- G. Appointment of Parliamentarian. The underclassperson scoring highest on the parliamentary procedure written test at state competition shall become the parliamentarian and shall be installed at the State Leadership Conference.

## **Section 7. Duties of FBLA State Officers.**

- A. The president shall:
  - 1. Serve as chairperson of the state executive board.
  - 2. Preside over the executive board meetings and business meetings of FBLA.
  - 3. Appoint appropriate committees and committee chairpersons.
  - 4. Serve as an ex-officio member of all committees.
  - 5. Perform other duties for the promotion and development of local, state, and national FBLA.
  - 6. Submit a short monthly report on Wisconsin FBLA's activities to the editor of the national publication, *Tomorrow's Business Leader*, or within whatever time frame is established by the national staff or officers.
  - 7. The president will serve as a voting delegate at the NLC.
- B. The state vice president shall:
  - 1. Assume the duties and responsibilities of the presidency should that office become vacant due to resignation or otherwise.
  - 2. Assume primary responsibility for developing the Wisconsin Annual Business Report.
  - 3. Assist the president in the promotion and development of FBLA.
  - 4. Be responsible for coordinating the state service projects.
  - 5. Serve as a voting delegate at the NLC.
- C. The regional vice presidents shall:
  - 1. Assist the president in the promotion and development of FBLA in the regions which elected them.
  - 2. Plan and preside over regional leadership conferences.
  - 3. Appoint a secretary to record the minutes for regional meetings.
  - 4. Serve as liaisons between the executive board, the state office, and all FBLA members in their respective regions.

- D. The secretary shall:
  - 1. Keep an accurate record of all business meetings of the State Leadership Conference and the state executive board.
  - 2. Supply one (1) photo-ready copy of the minutes of these meetings (including amended minutes) to the state office within ten (10) days following the meeting. Duplication and distribution will be handled by the state office.
- E. The treasurer shall:
  - 1. Present the financial reports of the Wisconsin FBLA Chapter at the State Leadership Conference and executive board meetings. All budgeting and monetary responsibility is maintained at the state office; however, the treasurer will receive information as to the accounting system and method of operation.
  - 2. Initiate memorandums and secure information relative to the use of the state approved fund raisers and shall promote the use of such fund raising projects by local chapters.
  - 3. Be responsible for obtaining and distributing the medals and plaques for the six (6) regional leadership conferences held in February.
  - 4. Be responsible for obtaining and/or maintaining and distributing promotional items, such as road signs, trading pins, etc.
- F. The reporter shall:
  - 1. Be responsible for publishing three (3) *Badger Business Bulletins* during the FBLA year.
  - 2. Be responsible for helping to maintain the FBLA state slide presentation.
  - 3. Assist the state president in submitting appropriate items to the editor of the national FBLA publication, *Tomorrow's Business Leader*.
- G. The parliamentarian shall:
  - 1. Serve as the official parliamentarian at all business sessions of the Wisconsin FBLA Chapter and advise the president on the orderly conduct of business in accordance with FBLA Bylaws and *Robert's Rules of Order Newly Revised*.
  - 2. Shall serve as a voting member of the state executive board.
- H. These officers shall serve on the state executive board, perform the duties prescribed in the bylaws, and perform such other duties as are directed by the president and the state staff and not inconsistent with these bylaws or other rules adopted by FBLA.

#### **Section 8. Regional and State Leadership Conferences.**

- A. Regional and State Leadership Conferences shall be held each year. A date and location will be recommended by the state staff and approved by the state executive board.
- B. Each local chapter in good standing shall be entitled to send two voting delegates from its membership to the Regional and State Leadership Conference.
- C. All voting delegates and competitive event participants of local chapters shall be officially certified by their respective advisers and their names submitted by a deadline set by the state office to the vice president responsible for the respective Regional Leadership Conference and the state office, or to the state office for the State Leadership Conference.
- D. Voting. Local voting delegates shall be entitled to vote on all matters which come before the regional and state general sessions. There will be no proxy voting.
- E. Quorum. The quorum for all business meetings of the Regional and State Leadership Conferences shall be a majority of the currently registered voting delegates eligible to vote and in attendance at that meeting.

## **Section 9. State Executive Board.**

- A. The state officers of FBLA shall, with their advisers, constitute the state executive board. The state staff shall be ex-officio, nonvoting members.
- B. Duties. The state executive board shall:
  - 1. Adopt policies of operation of FBLA as deemed necessary, by a majority vote.
  - 2. Approve committee appointments and the creation of new committees by the president.
  - 3. Review all proposed amendments to the bylaws.
  - 4. Present to the voting delegates at the State Leadership Conference those proposed amendments which have been approved by the state executive board.
  - 5. Perform such other duties as are prescribed by these bylaws.
- C. Meetings. Special meetings shall be called upon the written request of eight voting members of the state executive board, upon approval by the state staff. A minimum of two executive board meetings will be held annually.
- D. Voting by Mail. Business of the state executive board may be conducted by mail at the discretion of the president upon approval by the state staff. For adoption, action by mail shall require a plurality vote of the members eligible to vote, and shall be recorded in the minutes of the next regular meeting.

## **Section 10. Committees.**

- A. Advisory committees to assist in the growth and development of FBLA may be appointed as deemed necessary by the state executive board. Recommendations of persons for such appointments shall be requested of local chapters.
- B. Local and state chapters may select advisory committees to assist in the growth and development of their respective chapters.
- C. The president of FBLA shall, with the approval of the state executive board, establish committees, appoint their members for a period not to exceed the president's term in office, and assist in the committee's activities.
- D. An officer screening committee shall be appointed by the state staff in consultation with the president. The officer screening committee shall screen campaign materials, interview candidates, and approve candidates for nomination.
- E. Committee business may be conducted by mail at the discretion of the state staff. For adoption, action by mail shall require a plurality vote of the members eligible to vote and shall be reported to the committee members not later than the next regular meeting.

## **Section 11. Parliamentary Authority.**

The rules contained in *Robert's Rules of Order Newly Revised* shall govern the FBLA in all cases to which they are applicable and in which they are not inconsistent with the rules of FBLA-PBL, Inc., these bylaws, or any special rules of order the FBLA may adopt.

Revised April 1989  
Revised April 1995  
Revised April 1996  
Revised April 1998

## Appendix D

### Chapter Ceremonies

Planned ceremonies heighten awareness of the importance and impact of an occasion. On the following pages are *suggested* formats for chapter installation and installation of officers.

For chapter installation, the following setting is often utilized: individual tables for four speakers representing the written words *Future, Business, Leaders and America*; one long rectangular table for the president, adviser or installing officer.

Many chapters have impressive candlelight services. Candles lend a soft light to the setting and symbolize sealing of pledges. Candles of various colors may be used to represent certain offices as specified in some of the services. The candle on the table of the installing official should be the tallest candle used.

Background music (especially if provided by the music department of the chapter's school) adds to the effectiveness of the ceremony. Appropriate music, media/computer generated visuals, or other creative activities may be used throughout the entire ceremony or during certain parts of the program, such as during the reading of the creed or at the end of the program.

In more formal ceremonies, the officers and members may wish to dress appropriately. Otherwise, business attire is recommended.

### Chapter Installation

Whenever possible, the installation ceremony should take place before a large group such as a school assembly, assembly of business students, or a special meeting to which parents and business people are invited. Members of the installation team should be seated on a stage or a raised platform.

#### Materials Needed:

- One tall white candle
- Shorter candles: one each in gray, green, violet, blue, yellow, orange, and red
- Official charter
- Names of charter members

#### Installing Official:

(*Standing*) FBLA is a national organization for business students who are preparing for careers in business or business education. I have been authorized to conduct the installation of (*school name*), into the national organization Future Business Leaders of America.

Since the letters FBLA are used to designate the organization, its units and members, it is fitting that we consider what these letters and the words they represent mean to our organization.

#### Future:

Our daily educational experiences and our involvement in leadership activities prepare us for the future—a time to accept challenges.

In FBLA, we will find the tools to prepare for the future. We will profit from the experiences of others, those who have preceded us, as well as our teachers and others with whom we associate. Our studies

and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

### **Business:**

We realize the importance of education and training in business methods and procedures. We appreciate the roles of business and education in our daily lives.

### **Leaders:**

The future of our country depends on the quality of leadership. Leadership implies honor, foresight, tact, competence, dependability, discretion, and integrity. A leader must listen, withstand criticism and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of FBLA, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

### **America:**

If America is to remain a world leader, intelligent young men and women are needed to guide our country by studying America's past and analyzing her present. The initiative and success of leaders in business will help shape the future of America. Through FBLA, we will strive for leadership in the field of business, thereby helping to strengthen America.

*(Suggestion: At this point in the ceremony, it may be helpful to provide a brief history of FBLA.)*

Our organization has a definite and worthwhile list of goals. I should like to ask *(name of assistant installing officer or member of installation team)* to read these goals. *(See FBLA Goals on page 1.)*

**Assistant Installing Official:** *(Standing, reads the goals)*

### **Installing Official:**

Will the new officers of the *(school)* chapter of FBLA please rise and remain standing as I announce each office name. *(Installing officer calls name and title of each officer.)*

You have been chosen from among \_\_\_\_\_ members at *(name of school)* as officers for the coming year. You have been selected because your members have faith in your ability and confidence that you will fulfill the duties of your office. I now challenge you to accept the responsibility that has been given to you. Please raise your right hand repeat after me.

I, as an officer of the *(school)* chapter of FBLA do solemnly promise that I will fulfill the responsibilities of my office to the best of my ability, and that I shall carry them out in accordance with the bylaws of FBLA.

*(While lighting the tall candle.)* By lighting this candle, I seal the vow you have taken and vest in you the authority of your office.

*(Speaking to all members)* You have heard the vows that these officers of your chapter have taken. In your presence, I now declare them officially installed as officers of the *(school)* chapter of FBLA for the year, \_\_\_\_\_.

*(Speaking to officers and members, and particularly to chapter president)* By authority of FBLA-PBL, Inc., I am pleased to present you with the official charter of your chapter. *(Reads the charter.)* By virtue of this charter, this chapter now becomes a part of the national organization. You now have the privilege and the responsibility of operating under the name Future business Leaders of America and as a part of the state chapter and the national organization. The responsibility of making *(school)* chapter a success rests with its members and officers.

**Installing Official:**

The FBLA chapter president, *(name of president)*, will give the oath of membership to the charter members of the chapter. *(Chapter officers turn and face audience.)*

**Chapter President:**

The secretary will now read the names of the charter members of *(school)* chapter of FBLA. As the names are read, the members will please rise and remain standing until all members have been presented. Please wait to applaud the entire chapter membership.

**Chapter Secretary:**

*(Reads slowly the name of each charter member. Charter members stand as their names are called and remain standing until the oath has been administered.)*

**Chapter President:**

Each of you, please raise your right hand and repeat the oath of membership in unison after me.

I do solemnly promise to uphold the aims and responsibilities of FBLA and, as an active charter member, I shall strive to develop the qualities necessary to become a leader in business and in the community in which I live.

As president of *(school)* chapter of FBLA, I declare you duly inducted as charter members.

**Installing Official:**

*(Name of assistant installing official or member of installation team)* will lead members in reciting in unison the FBLA Creed. *(The creed is recited.) (See FBLA Creed on page 3.)*

**Installing Official:**

Will the newly elected officers of the *(school)* chapter of FBLA please come forward as I announce your office. *(Installing official lights white candle.)* Lighting the tallest candle symbolizes the chapter in its entirety with all its members working together. With this symbol, we shall charge each officer to do the job for which he or she has been elected.

*(Name of Parliamentarian)*, Parliamentarian. *(Parliamentarian comes forward.)* You have been named parliamentarian of the *(school)* chapter of FBLA. As parliamentarian, it will be your responsibility to monitor all formal chapter meetings so that they are conducted within the framework of parliamentary procedure. Through your efforts, the chapter meetings will be conducted in an orderly fashion, resulting in the efficient disposition of business. Do you accept this responsibility?

**Parliamentarian:** I do.



**Installing Official:**

I now declare you in the name of FBLA, the parliamentarian (*gray candle is lit by white candle*). This gray candle symbolizes the achievements possible when chapter meetings are conducted in an orderly fashion.

(*Name of Historian*), Historian. (*Historian comes forward.*) You have been elected historian of the (school) chapter of FBLA. As historian, it will be your responsibility to maintain records of the chapter including a report of activities, awards and publicity. Through your efforts, people see the progress and activities of your chapter. Do you accept this responsibility?

**Historian:** I do.

**Installing Official:**

I now declare you in the name of FBLA, the historian (*green candle is lit by white candle*). This green candle symbolizes the satisfaction that can be derived from preserving the past and recording the present while preparing for the future.

(*Name of Reporter*), Reporter. (*Reporter comes forward.*) You have been elected reporter of the (school) chapter of FBLA. As reporter, your job will be to report meetings and other newsworthy activities of the chapter through the proper channels. Do you accept this responsibility?

**Reporter:** I do.

**Installing Official:**

I now declare you in the name of FBLA, the reporter. (*Reporter selects violet candle from table, and installing official lights it with white candle.*) This violet candle symbolizes the inspiration and enlightenment that can be brought by reporting the activities of the FBLA chapter of (school).

(*Name of Treasurer*), Treasurer. (*Treasurer comes forward.*) You have been elected treasurer of the (school) chapter of FBLA. In electing you to this office, the members have shown their faith in your business ability and your honesty. Do you agree to keep accurate records of all money received and spent and to present orderly reports upon proper requests?

**Treasurer:** I do.

**Installing Official:**

I now declare you in the name of FBLA, the treasurer. (*Treasurer selects blue candle from the table, and installing official lights it with white candle.*) This lighted blue candle symbolizes the trust and confidence, which the members have, in your ability to safeguard all funds.

(*Name of Secretary*), Secretary. (*Secretary comes forward.*) You have been elected secretary of the (school) chapter of FBLA. Accepting this office obligates you to be present and keep a record of what takes place at every meeting. Do you accept this responsibility?

**Secretary:** I do.

**Installing Official:**

I now declare you in the name of FBLA, the secretary. (*Secretary selects yellow candle from table, and installing official lights it with white candle.*) This yellow candle symbolizes constancy in attendance and in keeping members informed of the chapter's progress.

(*Name of Vice President*), Vice President. (*Vice President comes forward.*) You have been elected vice president of the (*school*) chapter of FBLA. Your duty will be to assume the responsibilities in the absence of the president. Will you strive to carry out the duties of this office?

**Vice President:** I will.

**Installing Official:**

I now declare you in the name of FBLA, the vice president. (*Vice President selects orange candle from table, and installing official lights it with the white candle.*) This orange candle is the symbol of the harmony and faithfulness which should characterize your efforts in working with the president to carry out the ideals of the chapter.

(*Name of President*), President. (*President comes forward.*) The members of the (*school*) chapter of FBLA have bestowed upon you a great honor in electing you the president. Your major responsibilities are to lead and encourage this chapter in all its activities. It is your duty to preside at all meetings and see that they are conducted in accordance with the constitution and correct principles of parliamentary practice. Do you accept this responsibility?

**President:** I do.

**Installing Official:**

I now declare you in the name of FBLA, the president. (*President takes red candle from the table, and installing official lights it with the white candle.*) This red candle is the symbol of your duties and obligations to the chapter and its members.

(*Addressing members of the chapter.*) In your presence, I now declare these individuals officially installed as officers of the (*school*) chapter of FBLA for the coming year. (*Candle can be extinguished.*) You may be seated.

(*The newly elected president is called forward, and with a few appropriate remarks, the installing official presents the gavel to the new president who closes the meeting.*)

# Appendix E

## Terminology

**Adviser** - Person responsible for the management of the career and technical student organization.

**Advisory Committee** - A consulting body selected by the appointing authority to advise on Business Education. This committee serves as a sounding board and resource unit for planning and operating procedures. The committee assists in public relations, curriculum development, equipment selection, developing partnerships within business and industry, program evaluation, and other related activities.

**Articulation** - The state of interrelating parts fitting into a systematic whole. Also deals with “articulation” between technical college, university, and secondary teachers in order to provide meaningful curriculum efforts, credit transfer, staff development, and much more.

**Badger Business e-Bulletin** - An electronic newsletter published monthly in order to provide information to local FBLA chapters.

**Career and Technical Student Organization** - A student organization consisting of students interested in a particular area (business, agriculture, family and consumer education, marketing education, technology education, health and service education) and functions as an *integral* part of the instructional programs in the secondary schools.

**Chapter** - A term used to identify the local career and technical student organization. Because of our “co-curricular and integrated” nature of the organization, the term *club* is never used for our FBLA chapters.

**Chapter Event** - An event designed for total chapter membership involvement, and is typically part of the annual program of work.

**Competitive Events** - Leadership activities which are included as part of the Regional, State, and National Leadership Conferences.

**Ex Officio** - A person in an advisory capacity without voting privileges.

**Future Business Leaders of America (FBLA)** - A career and technical organization with state and national affiliations for students.

**Individual Event** - An event designed for an individual from a chapter to participate in.

**Intra-Curricular/Inter-Curricular** - Activities which occur within an established curriculum of a particular program area. Current educational initiatives, authentic assessment, competency development, other school to work transitional needs, and more are part of the chapter activities.

**Leadership Conferences** - Conferences at the regional, state, and national levels designed to promote leadership development and assessments of competencies demonstrated by individual and/or teams of students.

**Local Vocational Education Coordinator (LVEC)** - A qualified vocational education staff member who has overall responsibilities for all vocational education programs. This person works with **all** educational departments relating to the vocational education programs, works to develop integrated and applied curriculums, conducts or assists with in-service programs, helps establish and utilize steering and advisory committees, acts as the liaison with community resources including employment services, the technical colleges, labor and employer groups, develops business and industry partnerships on behalf of staff and students, and much more.

**National Office/National Staff/National Representatives** - Personnel responsible for the operation of FBLA at the National level.

**Program of Work** - A document designed to help chapters systematically plan their activities for the year as they relate to the goals of FBLA.

**Public Relations** - A method of improving and/or maintaining the image of the chapter/organization.

**Records Management** - A systematic approach to filing, recording, and managing a chapter's records. Current technology is utilized.

**Resource People** - Persons of the community who share their expertise with FBLA students and advisers.

**State Committee** - (See organizational chart)

**State Executive Board** - (See organizational chart)

**Team Event** - An event designed for two or more members from a chapter to participate in.

**Frequently Used Acronyms -**

**CTE** - Career and Technical Education Team

**DPI** - Department of Public Instruction

**NFLC** - National Fall Leadership Conference

**NLC** - National Leadership Conference

**RLC** - Regional Leadership Conference

**SLC** - State Leadership Conference